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AUTHOR Markey, Karen
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ABSTRACT

This report describes the pilot data collections and post-questionnaire interview activities of the Council on Library Resources (CLR)/Online Computer Library Center (OCLC) Online Public Access Project. The background of the project is briefly described, the purpose and adminstration of the post-questionnaire interviews are outlined, and pilot data collection activities are reviewed. The procedures of both the pilot data collection and the pilot data analysis phases of the project are then discussed. Two data tables accompany the text. Among the eight appendices to the report are guidelines for conducting post-questionnaire interviews, library catalog user and nonusar interview schedules, lists of user and nonuser questionnaire problems, the pilot test data collection manual, and the actual study data collection manual. (JL)

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Final Report to the Council on Library Resources

Pilot Test of the Online Public Access Catalog Project's User and Nonuser Questionnaires

by

Karen Markey, Ph.D.
Project Manager
Online Public Access Catalog Project
1982 March 31

OCLC
Office of Research
6565 Frantz Road
Dublin, Ohio 43017

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I. BACKGROUND

On October 9, 1981, the Council on Library Resources (CLR) awarded an Officer's Grant of up to $16,100 to enable OCLC (Online Computer Library Center) to

1. participate in the pilot data collection phase of the CLR Online Public Access Catalog Project and

2. train several individuals who will in turn train the actual interviewers in post-questionnaire interview techniques.

The objective of both the pilot data collection phase of the CLR Online Public Access Catalog Project and the post-questionnaire interviews was to test the user and nonuser questionnaires and data collection procedures under actual study conditions. Data from the pilot test questionnaire administration and post-questionnaire interviews were analyzed and contributed to the revision of questionnaires and data collection procedures to ensure that data collection proceeds smoothly in the actual study and that the instruments produce trustworthy and accurate data.

II. POST-QUESTIONNAIRE INTERVIEWS

A. SEMINAR

On October 30, 1981, participants in the CLR Online Public Access Catalog Project took part in a Seminar on How to Conduct Post-Questionnaire Interviews, administered by Dr. Robert Burnkrant, Faculty of Marketing, College of Administrative Science of The Ohio State University. The seminar was held in the Woodrow Wilson Room of the Library of Congress. Project participants attending were:

Christine Borgman, OCLC
Michael Burger, UC/DLA
Emily Fayen, Dartmouth College
Douglas Ferguson, RLG, Inc.
Neal Kaske, OCLC
Kathy Klemperer, UC/DLA
Karen Markey, OCLC
Joseph Matthews, J. Matthews & Associates
James McPhee, Syracuse University Libraries
Mike Michaud, UTLAS
Susan Miller, The Ohio State University Libraries
Sheila Walsh, The Library of Congress
Robert Zich, The Library of Congress

Dr. Burnkrant handled the seminar in such a manner that any of the participants would be able to train another person who was unable to attend to conduct post-questionnaire interviews. The outline of seminar activities (Appendix A) summarizes procedures and activities covered in the seminar. Dr. Burnkrant's presentation included videotapes of "good and bad" interviews and provided actual interviewing practice. When conducting practice interviews participants used response forms devised by Dr. Burnkrant (Appendix B). These practice interviews were valuable both for acquiring familiarity with interviewing procedures and for pretesting the interview form itself. As a result of this pretesting the original interview form was divided into the user (Appendix C) and nonuser (Appendix D) versions used at the pilot test sites.

B. PILOT TEST

Post-questionnaire interviews were conducted at the four library systems participating in the OCLC pilot test, viz. Dallas and Iowa City Public Libraries and The Ohio State and Syracuse University Libraries. Post-questionnaire interviews were conducted with questionnaire respondents when they finished completing user or nonuser questionnaires (see section III). Table 1 enumerates the number of post-questionnaire interviews conducted at OCLC pilot test sites. Over two-thirds of the total number of post-questionnaire interviews were conducted at these sites; the other third were conducted at sites administered by RLG, Inc., J. Matthews & Associates, and the Library of Congress.

Dr. Burnkrant reviewed the data from post-questionnaire interviews. He enumerated those questions and/or parts of the questionnaire with which respondents had problems, their reason(s) for the problems, and his recommendations for changes to the user and nonuser questionnaires (Appendixes E and F).

Respondents' remarks about problems completing the questionnaires were considered during the December 15, 1981, meeting of the Principals at UC/DLA, Berkeley, at which changes to the questionnaire were made. Respondents' responses recorded during post-questionnaire interviews led to some revisions, for example:

- Relocation of control information from front cover to back page on user and nonuser questionnaires
- Vertical expansion of user questions of Part 2 to provide more restful white space
- Horizontal expansion of meanings of response categories in Part 2 of user questionnaire
- Deletion of Part 5 of user questionnaire because of its bias towards computer catalog
- Rewrite of "current grade completed" question in both questionnaires
- Revised layout of nonuser questionnaire into only 2 pages
- Shortened user and nonuser questionnaires

Table 1. Post-Questionnaire Interview Productivity Data

Library System	No. of User Interviews	No. of Nonuser Interviews	Interviewer
Dallas Public Library	4	10	Markey
Iowa City Public Library	10	8	Markey
The Ohio State University Libraries	51	25	Kaske Markey Miller
Syracuse University Libraries	21	11	McPhee
TOTAL	86 User Interviews (69% of Grand Total)	54 Nonuser Interviews (68% of Grand Total)	
Other:			
Dartmouth College	1	0	
Library of Congress	15	5	
Northwestern University	15	16	
West Valley College	8	4	
GRAND TOTAL	125 User Interviews	79 Nonuser Interviews	

III. PILOT DATA COLLECTION PHASE

A. PROCEDURES

The four library systems taking part in the pilot test administered by OCLC were:

1. Dallas Public Libraries, Lillian Bradshaw, Director; Penny Washington, Study Liaison

    a. Central Library
    b. Fretz Park Branch
    c. Oak Lawn Branch
    d. Polk Wisdom Branch

2. Iowa City Public Library, Lolly Eggers, Director; Diane Ingersoll, Study Liaison

3. The Ohio State University Libraries, Dr. William Studer, Director; Susan Miller, Study Liaison

    a. Fine Arts Library
    b. Health Sciences Library
    c. Main Library
    d. Pharmacy Library
    e. Undergraduate library

4. Syracuse University Libraries, Donald C. Anthony, Director; James McPhee, Study Liaison

    a. Bird Library
    b. Engineering and Life Sciences Library
    c. Geology Library
    d. Mathematics Library
    e. Physics Library

Dr. Neal K. Kaske, Director of OCLC's Office of Research, obtained the support and participation of these four library systems in the Online Public Access Catalog Project during the proposal phase of the project. A liaison between the library system and the OCLC Project Manager was designated by the director of each library system. The liaison (or library supervisor) and the OCLC Project Manager discussed project objectives and data collection procedures. In view of staffing shortages, the OCLC Project Manager revised data collection procedures such as length of time blocks, dates of data collection, and the questionnaire completion quota per time block. For example, length of time blocks ranged from two hours at Iowa City Public Library to four hours at The Ohio State University Libraries. The Data Collection Manual and forms were revised to accommodate differences between libraries. Such differences should not affect the quality of the data collected and were only meant to facilitate participating libraries' data collection procedures.

The OCLC Project Manager conducted a training session with data collectors at both Iowa City Public Library and The Ohio State University Libraries. Training sessions at Dallas Public Library and Syracuse University Libraries were conducted by their study liaisons so the Data Collection Manual had to be easy for study liaisons and data collectors to read, understand, follow, and consult because the Project Manager was not available at these sites. With that concern in mind, the Project Manager revised the Data Collection Manual prepared by RLG, Inc. (The Research Libraries Group), deleting procedures which were handled at OCLC (e.g., sampling, scheduling, time block replacement, etc.). Part 2 of the RLG Data Collection Manual was rewritten so that this section alone was self-explanatory to data collectors who could not attend a training session on data collection procedures. Appendix G is a copy of the Data Collection Manual used at the four library systems in the pilot test.

A comparison of OCLC's Data Collection Manual and the Manual used at libraries where questionnaires were administered by RLG, Library of Congress (LC), and J. Matthews & Associates indicates that there is only one significant difference. Users at libraries administered by the former were asked to complete a questionnaire when they had completed their use of the computer catalog. Users at libraries administered by the latter were asked to complete the questionnaire while they were using the computer catalog. This practice was considered obtrusive and could have affected what the user did at the computer catalog, e.g., the type of search (questions 1-3), satisfaction (questions 5-7), features of the computer catalog which were used (questions 12-41), etc. Data collection procedures in the actual study have been changed at libraries administered by RLG, LC, and J. Matthews & Associates so that users are requested to fill out a questionnaire when they have completed their computer catalog search.

B. PILOT TEST

Users and nonusers of online public access catalogs at Syracuse and Ohio State Universities and Dallas and Iowa City Public Libraries completed pilot test questionnaires between November 14 and December 30, 1981. Dates of data collection varied from site to site because of semester breaks and library staffing patterns. Ohio State was the most prolific data collection site contributing 299 user and 135 nonuser questionnaires in brief 15- and 7-day data collection periods. Data collection at Ohio State was meant to be swift because of the impending final exam period.

Table 2 enumerates questionnaire response rate and productivity at the four library systems participating in the pilot test. The acceptance rate of users at three of the four sites exceeds 50%. Ohio State's low acceptance rate may be attributed to the fact that data collection took place immediately preceding final exams and students were too preoccupied and busy to participate. Although Ohio State may have contributed the greatest percentage of user questionnaires, recruitment of users at Iowa City was the most fruitful; nearly four users per scheduled hour were recruited and completed questionnaires. Dallas public Library's low number of completed questionnaires per scheduled hour may be due in part to the recent introduction of the computer catalog to the library.

Table 2. Questionnaire Response Rate and Productivity Data

Library System	No. of Data Collection Days	No. of Time Blocks	No. of Scheduled Hours	No. of Completed Questionnaires Per Hour	Complete	Incomplete	Total Acceptance	Decline	Total Valid	Repeaters	Acceptance Rate (%)	Completion Rate (%)	Response Rate (%)
USER QUESTIONNAIRE:													
Dallas Public Library Dec. 1-30 1981	30	28	56	1.6	92	13	105	52	157	6	67	88	59
Iowa City Public Library Dec. 1-22 1981	22	22	44	3.9	173	19	192	108	300	3	64	90	58
Ohio State University Libraries Nov. 16-30 1981	15	26	104	2.7	280	19	299	192	491	21	39	94	57
Syracuse University Libraries Nov. 16-Dec. 17 1981	32	30	80	2.8	223	37	260	231	491	16	53	86	45
					TOTAL USER QUESTIONNAIRES:		856						
NONUSER QUESTIONNAIRE:													
Dallas Public Library Dec. 1-22 1981	22	7	44	1.8	80	4	84	59*	143*	N/A	59*	95*	56*
Iowa City Public Library Nov.30-Dec.21 1981	22	13	44	2.4	104	16	120	353*	473*	N/A	34*	87	29*
Ohio State University Libraries Nov. 17-23 1981	7	8	32	3.9	125	10	135	297*	432*	N/A	29*	93	29*
Syracuse University Libraries Nov. 14-Dec. 16 1981	34	11	27.5	3.0	83	18	101	238*	339*	N/A	30*	82	24*
					TOTAL NONUSER QUESTIONNAIRES:		440						

* Includes refusals who were users. This may cause a significant decrease from figures in which only nonuser refusals are tallied. Time block report forms on which this information is recorded have been changed for the actual study so that refusals who were users will be singled out.

IV. DATA ANALYSIS AND INTERPRETATION

Completed questionnaires were sent to UC/DLA for scanning and data analysis. Although some Principals have chosen to make interpretations based on the data analysis, the object of the pilot test was the testing of the data collection instruments and procedures. Thus, this report only considers the analysis of the test of data collection instruments and procedures and does not make any substantive conclusion about users' searches, attitudes, or suggestions for improvements in online public access systems.

Analyses of post-questionnaire interviews, supervisors' reports, validity checks, response-set bias tests, questionnaire length tests, frequency distributions, and missing values resulted in many changes to the user and nonuser questionnaires. Perhaps the most significant change to the questionnaires is the reduction of the number of user questions from 81 to 59.

With respect to data collection procedures, the Data Collection Manual (Appendix H) was revised to show examples of partially completed and completed forms. The number of forms that data collectors complete per time block has been reduced from 5 (per four-hour time block) to 1; consequently, the data collector's task has been simplified. To speed up recruitment of users and nonusers, data collectors will recruit fewer respondents in low productivity sites (e.g., special libraries at academic sites) and approach every library user for participation in the actual study (rather than every other library user).

Undoubtedly what was learned in the pilot test has resulted in streamlined data collection procedures. Few surprises are anticipated in the actual study. The most important objective of the pilot test was the revision of data collection instruments. Since revision of the instruments was based on many types of information from many sources, the investigators feel that the data collection instruments of the actual study will produce accurate and reliable data from which to analyze, interpret, and draw conclusions. The Council on Library Resources' support of the pilot test is a true indication of its commitment to quality research from which all library users may ultimately benefit.

APPENDIX A

How to Conduct Post-Questionnaire Interviews
Seminar Outline
Online Public Access Catalog Project
October 30, 1981
The Library of Congress
Dr. Robert Burnkrant

I. Introduction: overview of morning's activities

II. Objectives of pretesting and how it is typically accomplished

- A. Major objective: to determine changes necessary in the questionnaire to ensure that instructions and questions are clear, meaningful, and comprehensive
- B. The pretest usually builds on prior research
- C. Frequently several pretests are required

III. Recommended procedure

- A. Gaining respondents' cooperation
- B. Observing respondent filling out questionnaire
- C. Obtaining reactions from the respondent
- D. Probing for additional information
- E. Recording the respondents' comments

IV. Watch and discuss videotaped interviews

- A. Illustration of incorrect procedures
- B. Example of recommended approach
- C. Discussion

V. Interview practice sessions

- A. Interview each other
- B. Discussion

VI. Conclusion

APPENDIX B

Interview Schedule: 1. Library System_____

2. (circle one) User, Nonuser 3. Terminal location/building_____

4. Date_____ 5. Questionnaire No._____ 6. Interviewer_____

I. Observations: (Note the questions on which respondent seems to have trouble and specify nature of problem. If respondent pauses or seems confused note the question number and write that down. If respondent asks you a question write down the question number and the respondent's question.)

_____

_____

_____

_____

_____

_____

II. Interview: "Now I'd like to ask you a few questions about your reactions to the questionnaire." (Be sure to probe on these.)

1. "First of all, what did you think of the questionnaire in general? That is, did you think it was a good questionnaire or a bad questionnaire, and why?"

_____

_____

_____

_____

_____

_____

10

APPENDIX B

2. "Did the questionnaire permit you to completaly communicate your views about the computer catalog system or did some questions come to mind that were not asked?"

(After asking each of the following questions be sure to pause to give the respondent a chance to look over the questionnaire and answer. After the person gives a response draw him (or her) out so that you can specify precisely what it is that is confusing or unclear. Then ask if any other questions were unclear or confusing. Continue this until it ceases to be productive. Be sure to also ask the following for all questions containing erasures, marginal notes, multiple responses (except Part 4), or "other" responses: "What about number ___? Did that question seem unclear or confusing to you?" Also write down question number and response for each of these.)

3. "Now let's look at the major parts of the questionnaire. Did the instructions or any of the questions in Part 1 seem unclear or confusing to you?"

4. "Now let's go to Part 2. Did the instructions or any of the questions in this part of the questionnaire seem unclear or confusing to you?"

5. "Can you think of any other questions about (your) use of the computer catalog system that should have been asked in this part of the questionnaire?"

6. "Were any of the questions in Part 3 confusing or unclear?

(On all nonuser questionnaires go directly to question 11.)

7. "Can you think of any other questions that should have been added to this part of the questionnaire?"

8. (Ask only for user questionnaires) "Were any questions in Part 4 unclear or difficult to answer in any way?"

9. "Was there anything confusing or unclear about the questionnaire in Part 5?"

10. "Were there any questions in Part 6 which were unclear or confusing?"

_____

_____

_____

_____

_____

_____

11. (Ask everyone) "Can you think of any other changes in the questionnaire that might improve it in any way?"

_____

_____

_____

_____

_____

_____

"Thank you very much!"

To Interviewer:

Before going on to the next respondent re-read your notes to make sure they are complete and legible. Record in the space below any other relevant reactions or summary observations about the interview.

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APPENDIX C

USER INTERVIEW SCHEDULE

1. Library System _____
2. Terminal location/building _____ 3. Date _____
4. Questionnaire No. _____ 5. Interviewer _____

I. General Observations: (Note questions & number on which respondent seems to have trouble; specify nature of problem. Use this area for general observations only. Use the following pages for specific questions.)

II. Interview: "Now I'd like to ask you a few questions about your reactions to the questionnaire." (Be sure to probe on these.)

1. "First of all, what did you think of the questionnaire in general? That is, did you think it was a good questionnaire or a bad questionnaire, and why?"

2. "Did the questionnaire permit you to completely communicate your views about the computer catalog system or did some questions come to mind that were not asked?

Observations Part 1, Questions 1 - 11

(After asking each of the following questions be sure to pause to give the respondent a chance to look over the questionnaire and answer. Draw the person out so that you can specify precisely what it is that is confusing or unclear.

3. "Now let's look at the major parts of the questionnaire. Did the instructions or any of the questions in Part 1 seem unclear or confusing to you?

Observations Part 2, Questions 12 - 42

4. "Now let's go to Part 2. Did the instructions or any of the questions in this part of the questionnaire seem unclear or confusing to you?"

-3-

5. "Can you think of any other questions about use of the computer catalog system that should have been asked in this part of the questionnaire?"

Observations Part 3, Questions 43 - 58

6. "Were any of the questions in Part 3 confusing or unclear?

7. "Can you think of any other questions that should have been added to this part of the questionnaire?"

APPENDIX C

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Observations Part 4, Questions 59 - 61

8. "Were any questions in Part 4 unclear or difficult to answer in any way?"

Observations Part 5, Questions 62-69

9. "Was there anything confusing or unclear about the questionnaire in Part 5?

10. "Can you think of any other ways in which the card catalog can be compared to the computer catalog?"

Observations Part 6, Questions 70 - 81

11. "Were there any questions in Part 6 which were unclear or confusing?"

12. "Can you think of any other changes in any part of the questionnaire that might improve it in any way?"

"Thank you very much!"

To Interviewer:

Before going on to the next respondent re-read your notes to make sure they are complete and legible. Record in the space below any other relevant reactions or summary observations about the interview.

APPENDIX D

NONUSER INTERVIEW SCHEDULE

1. Library System _____

2. Terminal location/building _____ 3. Date _____

4. Questionnaire No. _____ 5. Interviewer _____

I. General Observations: (Note questions & number on which respondent seems to have trouble; specify nature of problem. Use this area for general observations only. Use the following pages for specific questions.)

II. Interview: "Now I'd like to ask you a few questions about your reactions to the questionnaire." (Be sure to probe on these.)

1. "First of all, what did you think of the questionnaire in general? That is, did you think it was a good questionnaire or a bad questionnaire, and why?"

2. "Did the questionnaire permit you to completely communicate your views or did some questions come to mind that were not asked?

Observations Part 1, Questions 1 - 5

(After asking each of the following questions be sure to pause to give the respondent a chance to look over the questionnaire and answer. Draw the person out so that you can specify precisely what it is that is confusing or unclear.

3. "Now let's look at the major parts of the questionnaire. Did the instructions or any of the questions in Part 1 seem unclear or confusing to you?

Observations Part 2, Questions 6 - 13

4. "Now let's go to Part 2. Did the instructions or any of the questions in this part of the questionnaire seem unclear or confusing to you?"

APPENDIX D

-3-

Observations Part 3, Questions 18 - 22

5. "Can you think of any other ways in which the card catalog might be compared with the computer catalog?

6. "Were any of the questions in Part 3 confusing or unclear?

7. "Can you think of any other changes in any part of the questionnaire that might improve it in any way?"

"Thank you very much!"

-4-

To Interviewer:

Before going on to the next respondent re-read your notes to make sure they are complete and legible. Record in the space below any other relevant reactions or summary observations about the interview.

APPENDIX E

User Questionnaire Problems

Analysis of Post-Questionnaire Interviews

By Dr. Robert Burnkrant

Part/Question	Problem	Reason	Action
Cover coding area "for office user only"	Users try to fill it out	(from Posts)	Put "for office user only" on back of questionnaire
Cover instructions	Users make check marks or X's in circles	Don't read instructions or instructions not large enough	Stress that circles need to be filled in completely
Part 1/#1e & f, #3e & f	Categories are redundant	(from Posts)	Consolidate into #1e & #3e "Subject(s)" or "topic(s)"
Part 1/#5b	Asks for 2 things	(from Posts)	Make into 2 separate categories: "all of what I was looking for"; "most of what I was looking for"
Part 2	Compactness of layout	Users have difficulty linking questions & response categories	Expand vertically
Part 2	Difficulty following response categories & what they mean	(from Posts)	(1) Cascade meanings of response categories, e.g. DOES NOT APPLY STRONGLY DISAGREE DISAGREE NEITHER AGREE NOR DISAGREE or (2) Head each column as in Part 5 - there's a lot of space to do this if you delete subheadings like "During a search:" or "In general:"
Part 2	Additional questions	(from Posts)	Add agree/disagree-type questions: (1) The listing of books is complete; (2) Abbreviations are hard to understand; (3) The number of available procedures is sufficient; (4) Instructions are adequate; (5) The material on the screen is helpful; (6) More system help facilities should be available on the system

APPENDIX E (continued)

Part/Question	Problem	Reason	Action
Part 2/#28	Wording unclear	(from Posts)	Reword #28. Understanding how to perform operations for AND, OR, NOT are difficult. NOTE: Are we interested in the explanation of operations for AND, OR, NOT?
Part 2/#20-#21	Wording unclear	What does "increasing" and "retrieved" mean?	
Part 2/#23-#24	Wording unclear	What does "codes" mean?	
Part 2/#36	Wording	(from Posts)	Change "years" to "dates"
Part 3/Instructions, #43, #47-#48, #50; Part 4/Instructions	Definition	Does "terminal" mean the same thing as "computer catalog"?	Change "terminal" to "computer catalog" to keep terminology consistent
Part 3	Additional question	(from Posts)	Instruction brochures are frequently not available
Part 3/#56-#58	Definition	What is a "printer"?	Revise instruction: "If there is no printer attached to your computer catalog..."
Part 4/#59-#61	Users answering only once	Do not see "select up to four"; Users are unfamiliar with what computer catalog already contains	Put instructions into questions, e.g., "Select up to 4 additional features which you would like the computer catalog to have."
Part 4/#59	Additional response categories	(from Posts)	(1) Search for words that sound like a given word; (2) Ability to provide abstract of books; (3) Tell what floor book is on or if it is on reserve; (4) Lists of related subjects; (5) More help facilities & explanations of abbreviations; (6) Remote access

APPENDIX E (continued)

Part/Question	Problem	Reason	Action
Part 5	Biased in favor of computer catalog	By deleting section, same result can be obtained by disagree-agree format of Parts 2 & 3 and asking people about computer catalog. In Nonuser survey, change Part 2 to Disagree-Agree section bearing selected questions from Parts 2 & 3 of user questionnaire	Delete entire section
Part 5	Additional response categories	To reverse bias from computer catalog	(1) Complete information about a source; (2) Waiting time; (3) Feeling rushed while searching; (4) Convenience of searching
Part 5/#70-#73	How do we handle sporadic but intensive users?	Questions #70-#73 capture users with regular library habits	Add question: Maybe something on familiarity with library resources?
Part 6/#73	Definition	What is computer "technology"?	Change: delete word "technology"

APPENDIX E (continued)

Part/Question	Problem	Reason	Action
Part 6/#78	Looks like 3 questions	Users answer 2 or 3 times	Rewrite question: maybe no need to change type fonts for headings, or up to five / eleven six / twelve seven / Freshman eight / Sophomore nine / Junior ten / Senior Graduate School
Part 6/#79-#81	Only 1 response allowed	Users need more than 1 response because of people with double majors	Include instructions (mark up to 3)

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APPENDIX G

Part 1
General Information About the Project

1.1 An Introduction to Online Public Access Systems: Data Collection and Analysis

The Online Public Access Systems Project is part of a national study to increase general knowledge and understanding about patron use of computer catalogs in North American academic, research, and public libraries. The national study is funded by grants from the Council on Library Resources, Washington, D.C. to a consortium of library research, service, and education organizations including: The Library of Congress; Joseph Matthews & Associates, OCLC Online Computer Library Center, Inc.; The Research Libraries Group, Inc. (RLG); University of California, Division of Library Automation (UC/DLA); and University of Toronto Library Automation Systems (UTLAS).

Study design and planning began in December, 1980. The basic strategy is to use self-administered questionnaires to acquire information from samples of computer catalog users and nonusers in academic, research, and public libraries where online public access catalogs are available for public searching. Questionnaires will be analyzed to find out how users search the computer catalog, what problems they have, and what new features of the computer catalog they would like. Information acquired through the analysis will assist libraries in the transition from card to online catalogs and offer recommendations for the design of new online catalogs and the enhancement of existing ones.

1.2 Data Collection Manual

This Data Collection Manual was prepared by RLG and revised by OCLC to serve as the basic reference and training document for OCLC's Pilot Test of the questionnaires during November and December of 1981. Another revision of the manual will be done to accommodate procedures followed in the Final Study Survey in the Spring of 1982.

This Manual will be used by those having any one of the three study roles as defined in Section 1.3, namely:

1. Study Coordinators (Kaske and Markey)
2. Library Supervisors (Ingersoll, McPhee, Miller, and Washington)
3. Data Collectors

By following this Manual, we are striving to assure that data collection procedures are uniform for the four library systems participating in the project. The Manual can be used to clarify communication and to coordinate activities among Study Coordinators, between Library Supervisors and Study

Coordinators, and between Data Collectors and Library Supervisors. It can help Study Supervisors when training Data Collectors or serve as a ready reference guide to clarify procedures. Finally, the Manual may help resolve uncertainties or issues in analyzing the data collected, by documenting in advance what data was sought, and what procedures were specified to collect that data.

The Manual contains three parts. Part 1 describes general information about the study. Part 2 is addressed to Data Collectors and walks through the process of recruiting users and nonusers; this part can be used to train Data Collectors. Part 3 highlights the responsibilities of Study Supervisors, particularly the training of Data Collectors.

1.3 Individuals Responsible for Data Collection

Three roles with corresponding responsibilities are involved in the data collection effort:

STUDY COORDINATOR (Kaske and Markey). The Library Supervisor's principal contact about the Project. Provides Questionnaires, Data Collection Schedules, forms, signs, and procedures about the data collection process to the Study Supervisor. Supports Supervisor prior to and during the study concerning activities and problems. Provides whatever other information, guidance, or assistance the Study Supervisor may require.

STUDY SUPERVISOR (Ingersoll, McPhee, Miller and Washington). Organizes and manages all data collection activities for the study in his Library System. Recruits, selects, trains, coordinates and oversees the activities of the Data Collectors. Receives, stores and is responsible for the return of questionnaires, forms, and other materials provided by the Study Coordinator. Is responsible for Data Collectors' compliance with Data Collection Schedule and Procedures. Provides other necessary administrative materials, e.g. pencils, clipboards. Reviews all completed questionnaires to ensure the completeness and satisfactory quality of data during collection. Handles inquiries about the Study. Makes certain that completed questionnaires are returned according to specified schedule. Keeps Study Coordinator currently and accurately informed about the progress and status of the data collection effort. Alerts Coordinator whenever any significant problems occur and works with the Coordinator to resolve problems. May take on role of Data Collector or Post-Questionnaire Interviewer.

DATA COLLECTOR. Under the Supervisor's direction, the Data Collector is responsible for actual collection of data from users and nonusers of computer catalogs at terminal and library locations during predetermined time blocks. Recruits, selects, and screens respondents to complete questionnaires; checks questionnaires for completeness and submits them to storage area or Supervisor after each time block covered. For each time block, completes Time Block Segment Tally Forms which report on control information, acceptance and refusal statistics, background information items, and summarizes Segment Tally Form information on Time Block Summary Sheets. Reports any problems which disrupt data collection or may affect the quality of data being collected.

1.4 Orientation of Library Staff and the Community

Successful data collection in the library can be aided by understanding and support of library staff and patrons. Natural curiosity as to the nature and purpose of the study will be aroused when data collection begins. Study Supervisors may elect to disseminate information about the study in the form of:

Information Sheet: An information sheet describing the study has been prepared by OCLC. We suggest that Study Coordinators post the sheet on bulletin boards in the library and other appropriate areas such as reference desks, or information desk to give to persons inquiring about the study.

News Release: The Information Sheet also serves as a news release about the study. Study Supervisors can notify campus and community media about the study by sending them a cover letter accompanied by the Information Sheet.

Staff Meeting Presentation: Study Supervisors may elect to make a brief presentation about the Study at a regularly scheduled library staff meeting.

1.5 Data Collection Materials

A specific set of forms, materials, and supplies is required for the data collection effort. Questionnaires are the fundamental data collection instrument, and are provided to the library in the quantity required. Copies of other forms are provided to the library by OCLC. All necessary forms, materials, and supplies are itemized below. (S) after an item means that the item will be provided by OCLC in sufficient quantity. (L) after an item means that the item is provided by the participating library.

1. Sampling Schedule (S)
2. User Questionnaires (S)
3. Nonuser Questionnaires (S)
4. User Questionnaire Time Block Summary Form (S)
5. Nonuser Questionnaire Time Block Summary Form (S)
6. User Questionnaire Time Block Segment Tally Form (S)
7. Nonuser Questionnaire Time Block Segment Tally Form (S)
8. General Notice "Computer Catalog Study in Progress" Sign (S)

9. Reserved tables/chairs at data collection site (L)
10. Tabletop "Reserved" signs (S)
11. Box for completed questionnaires (L)
12. Sign to attach to box for completed questionnaires (S)
13. Data Collector's ID Badge (S)
14. Supply of #2 pencils (L)
15. Clipboard (L)
16. Timepiece or watch (L)
17. Post-User Questionnaire Interview Forms (S--Syracuse and OSU only)
18. Post-Nonuser Questionnaire Interview Forms (S--Syracuse and OSU only)
19. Supervisor's Report Forms (S)
20. Data Collection Manual (S)
21. Information Sheet (S)

Part 2
Pilot Test Procedures for the Data Collector

2.1 Overview of Pilot Test Data Collector Procedures

Study Supervisors (Ingersoll, McPhee, Miller, and Washington) work closely with Data Collectors to ensure that their activities are coordinated and the procedures of data collection are similar from library to library. Data Collectors recruit users of the computer catalog at computer catalog terminal locations to complete a multiple-choice user questionnaire. Nonusers are recruited to complete a multiple-choice nonuser questionnaire at library entrances or card catalogs. Post-questionnaire interviews are conducted at Ohio State and Syracuse University Libraries to determine problems with the questionnaire, specifically its layout, wording, visual impact, length, etc. Questionnaire responses and post-questionnaire interview remarks will be analysed to discover what questions or parts of the questionnaires need revision to construct more reliable and trustworthy data collection instruments.

2.2 Sampling Schedule

Study Supervisors have received Time Block Schedule Worksheets (figure 1) upon which they have recorded libraries, dates, and times when data collection can take place. Study Coordinators have drawn up a Sampling Schedule listing the type of questionnaire (user or nonuser), library location, dates and times when data collection will be carried out. The Sampling Schedule is intended to obtain a representative sample of the library's users as respondents to the user and nonuser questionnaires.

2.3 Assigning Data Collectors to Time Blocks

The Sampling Schedule (see section 2.2) lists type of questionnaire, library location, terminal location (user questionnaire only), library entrance or card catalog area (nonuser questionnaire only), dates, and times when data collection will take place. It is constructed to allow for the completion of at least 120% of the total number of questionnaires per library; when 100% of the total number of questionnaires have been completed, data collection stops even though more time blocks may be listed on the schedule. Data collection will take place during these extra time blocks when problems, e.g. computer down time, illness of data collectors, etc., occur during previously scheduled time blocks.

The Study Supervisor assigns Data Collectors to time blocks and informs Data Collectors about their assignments. The notification includes type of questionnaire, date, time block, library location and specific area in the library (e.g. card catalog, entrance, etc.); the last two types of information are assigned codes so that the codes are transferred onto covers

1 Library/Regular hours	2 Means of Main Entrances	3 Name of Terminal Location	4 No. of Terminals	5 Dates of Recruitment	6 Hours of Recruitment	7 Hours of Post-Questionnaire Interviews
Joseph L. Bell Memorial Library 9am - 9pm, Mon - Thurs 9am - 6pm, Fri 9am - 5pm, Sat.	SW	Card Catalog	2	Nov. 9 Nov. 10 Nov. 11, 12 Nov 13 Nov. 14 Nov. 15 ...	9am - 10am, Noon - 3pm 9am - 10am, 3pm - 8pm 9am - 1pm NONE 1pm - 5pm 9am - 10am, Noon - 4pm ...	None 6pm - 7:30pm 9am - 10:30pm — None Noon - 4pm ...
John A. Doe Jr. Ridgeside Branch Library 1 am - 9am, Mon - Fri Midnit - 9am, Sunday	Burnham St. North	Penthouse Attic 1st Floor, card catalog 2nd Floor 3rd Floor 4th Floor 5th Floor 6th Floor	1 3 1 1 1 1 1 1	Nov. 9 Nov. 10 Nov. 11 Nov. 12 - 13 Nov. 15 ...	1am - 9am 1am - 4am None 3am - 6am Midnit - 6am ...	None 1am - 4am — 3am - 4:30am Midnit - 6am ...
...	...	...	...	...	...	...

! EXAMPLE !

FIGURE 1

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of questionnaires during post-coding (see sections 2.4.7 - 2.4.8 and 2.5.7 - 2.5.8).

2.4 How to Recruit Users

A "user" is a person observed using the computer catalog, i.e. sitting or standing in front of computer catalog and touching keys or screen, looking at a display device, referring to display device to write something down, etc. Users are nabbed for participation in the computer catalog study when they leave the terminal.

2.4.1 Obtain Data Collection Materials from Storage Area

At the designated time and day, the Data Collector fetches the Data Collection Materials from the storage area. Before she proceeds to the assigned terminal location, the Data Collector makes sure that she has the following materials for a five-hour time block (the number of questionnaires and Time Block Segment Tally Forms varies according to length of time block; figure 4 questionnaires per hour):

1. 20 User Questionnaires
2. 1 User Questionnaire Time Block Summary Sheet
3. 6 User Questionnaire Time Block Segment Tally Forms
4. 1 General Notice "Computer Catalog Study in Progress" sign
5. 2-3 Tabletop "Reserved Computer Catalog Study in Progress" signs
6. Sign to attach to box for Completed Questionnaires
7. Box for completed questionnaires
8. ID Badge with Data Collector's name
9. Supply of No. 2 pencils
10. Clipboard
11. Watch or timepiece

2.4.2 Set up Data Collection Site

The Data Collector arrives at the data collection site which is near computer catalog terminals. She places tabletop "Reserved for Computer Catalog Study" signs on the table set aside as a work station for users

who will complete questionnaires and posts the general notice "Computer Catalog Study in Progress" sign in a conspicuous location. Putting on her ID badge, the Data Collector makes sure that questionnaires are in ascending numerical order and she has related paper materials, e.g. Tally Forms, Summary Sheets, close at hand or attached to her clipboard. When the Data Collector is ready, she fills in the first seven items on the Time Block Segment Tally Form (figure 2) and begins to recruit users.

2.4.3 Recruit Users

The Data Collector mentally notes the first person to leave a computer catalog terminal, then approaches the next person who leaves a computer catalog terminal to fill out a user questionnaire. She says:

> "Hello, I'm (name) . The library is taking part in a national study of computer catalogs. Please take a few minutes to fill in this questionnaire [handing questionnaire to prospective respondent] about the library's catalogs."

2.4.3.1 If The Prospective Respondent Declines . . .

Few prospective respondents will decline outright, for example, saying "Gotta go, have a class," "Who cares?" "Don't bother me" (or words to that effect). Most people will appear to want more information about the study like the time required to complete a questionnaire (see section 2.4.3.3). For persons who decline outright, reply: "Thank you very much," and let the person go on his way. The Data Collector refers to the Time Block Segment Tally Form. item #8b., estimates the person's age, sex, and checks the appropriate column if the person mentioned that his reason for refusing was that he had already filled out the questionnaire (repeater) or he is a nonuser, i.e. has never used the computer catalog. She records the exact time in the far right column of the Tally Form. She does not fill in any information to the left of the column marked 8b.

The Data Collector then resumes the process of recruiting users (see section 2.4.3.).

2.4.3.2. If the Respondent Accepts . . .

Few respondents will accept outright, for example, saying, "Of course," "Yes," etc. Most people will appear to want more information about the study (see section 2.4.3.3). For persons who accept outright, reply:

> "Here's a questionnaire, [escorting him to work station] somewhere to sit, and a pencil to fill it out. When you finish please put the questionnaire

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FIGURE 2

User Questionnaire
TIME BLOCK SEGMENT TALLY FORM

1. Library System _____ 2. Date _____
3. Terminal Location _____ 4. Time Block __:__ - __:__
5. Recruiter's Initials _____ 6. Segment Number _____
7. Time Recruiting Began __:__

8. Person Approached	8a. Person ACCEPTED Questionnaire No.	Time Now	8b. Person REFUSED Estimate Age	Sex (M/F)	Repeater (check)	Nonuser (check)	Time Now
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							

9. Time at completion of (select which comes first):
__:__ Time Block Segment Tally Form
__:__ Segment (i.e. 5 persons ACCEPT)

in the box marked "Please put Questionnaires Here."

The Data Collector refers to the Time Block Segment Tally Form, item #8a. She marks down the questionnaire number she has just given to the user (just subtract one from the next questionnaire to be given away) and records the time. The Data Collector does not write anything in the column labeled 8b. or to the right of it.

The Data Collector then resumes the process of recruiting users (see section 2.4.3) unless she has recruited five users to complete the questionnaire. If she has recruited five users, she marks the time on the bottom of the Tally Form (item #9). The Time Block Segment Tally Form is complete for this segment of the Time Block.

To take a break, the Data Collector must wait until users complete the questionnaire to leave the terminal location. When users have completed and deposited the questionnaires, the Data Collector can leave the terminal location as long as materials are secure (in view of another library staff member, taken down and collected, etc.). The break may range from 0 to 15 minutes. When the Data Collector returns from her break, she may have to set up some materials and signs. She begins a new Time Block Segment Tally Form by completing the first seven items of information; the segment number (item #6) will be 2 if the Data Collector has recruited five users so far, or 3 if the Data Collector has recruited ten users so far, etc. The Data Collector then resumes the process of recruiting users (see section 2.4.3.).

2.4.3.3 If the Prospective Respondent Wants More Information . . .

Possible respondent inquiries and Data Collector responses are:

R: How long will it take?
DC: About 15 minutes.

or

R: What's it for?
DC: A national project to study and analyze computer catalogs.

or

R: I don't know anything about computers
DC: We'd like to find out your opinions and expectations of this library's computer catalog which you just used.

or

R: Can I take it home?

DC: Because it refers to what you just did on the computer catalog, we feel it would be easier for you to fill it out right here.

or

R: I've already filled one out.
DC: Thank you very much.

or

R: But I'm a library staff member.
DC: We are only surveying library patrons today. Thank you anyway.

or

R: [Volunteering] Can I fill one out?
DC: Sure. Thank you. [Note this person by questionnaire number on the Time Block Segment Tally Form and separate his questionnaire from the others at the end of the Time Block. We may use these volunteer questionnaires at a later time but they should be pointed out to the Study Supervisor on the Time Block Summary Sheet under "General Problems or Comments."]

or

R: Who is supporting the study?
DC: The Council on Library Resources in Washington, DC, has given a grant to OCLC (or Online Computer Library Center) in Ohio who administers the study in our library.

At the completion of the inquiry or the negotiation, the prospective respondent may accept (see section 2.4.3.2) or decline (see section 2.4.3.1). Remember to record the respondent's action as an acceptance or refusal on the Time Block Segment Tally Form.

2.4.4 Handling Questions from Users

When respondents are completing the questionnaire, they may ask the Data Collector questions about the instrument. Questions may be about the mechanics of filling out the questionnaire or about the meaning of questions. In the case of the former, advise the respondent to reread the instructions of the particular section of the questionnaire.

To handle meaning questions, reply to the respondent:

"Answer the question however you think it means."

Jot down the question number and respondent's difficulty on the Time Block Summary Sheet, entitled "General Problems or Comments." At Syracuse and OSU, post-questionnaire interviewers may be present during recruitment of respondents. If a respondent asks the Data Collector a question, the Data Collector should handle the question in the manner described above, then alert the post-questionnaire interviewer about the respondent's question so that the interviewer can conduct a post-questionnaire interview with this particular respondent.

2.4.5 Post-Questionnaire Interviews with Users

At Syracuse and OSU, post-questionnaire interviews will be conducted during some Time Blocks. The purpose of post-questionnaire interviews is to identify problems that respondents encounter when filling out questionnaires so that they can be changed to ensure that instructions and questions are clear, meaningful and comprehensive.

The Study Coordinator alerts the Data Collector when interviews will be conducted concurrently with recruitment of respondents. Post-questionnaire interviews should not interfere with recruitment of respondents, but the Data Collector can help the interviewer by pointing out respondents who approach her to ask questions about the meaning and mechanics of the questionnaire and its questions.

2.4.6 Closing Up the Data Collection Site

When the Data Collector has recruited twenty people to complete the questionnaire or the amount of time allocated to a Time Block has expired, the Data Collector is free to conclude the Time Block by refraining from recruitment activities. The Data Collector waits for the last person completing a questionnaire to deposit it in the collection box, then takes down signs and rearranges furniture if necessary.

Before leaving the data collection site, the Data Collector must have in hand:

1. 20 questionnaires
2. 1 Time Block Summary Form
3. 6 Time Block Segment Tally Forms
4. Signs: general notice and tabletop signs
5. Deposit box labeled with sign
6. ID Badge

7. Supplies: #2 pencils, clipboard, watch

2.4.7 Post-Code User Questionnaires

After closing up the data collection site, the Data Collector finds a comfortable working area where she can spread out user questionnaires, tally forms and summary sheets, to post-code information on the covers of the questionnaires. Follow these steps:

(1) Arrange completed user questionnaires in ascending numerical order

(2) Arrange Time Block Segment Tally Forms in ascending numerical order according to item 6, segment number.

(3) Refer to cover of user questionnaires in box marked "Office Use Only"

(4) For every questionnaire, fill in the circles corresponding to today's date

(5) For every questionnaire, fill in the circles corresponding to the Data Collector's initials (use "x" if you have no middle name)

(6) For every questionnaire, fill in the circles corresponding to the Terminal Location. (Refer to your schedule or consult Study Supervisor if you are uncertain)

(7) For every questionnaire, fill in the circles corresponding to the Library System (Syracuse = SYR; Ohio State = OHI; Dallas Public Libraries = DAL; Iowa City Public Libraries = IOW)

(8) For every questionnaire, fill in the circles corresponding to the time when you gave the respondent the questionnaire (refer to the Time Block Segment Tally Forms to obtain this information)

(9) Disregard the "Terminal I.D." circles

(10) Spot-check completed questionnaires. If questionnaires are mutilated or contain a lot of extraneous markings, record their serial numbers (on cover page, bottom right corner) and nature of the mutilation on the Time Block Summary Sheet, item #11c, "General Problems or Comments."

2.4.8 Complete Time Block Summary Sheet

When you complete the Time Block Summary Sheet (see figure 3) refer to the Time Block Segment Tally Forms for items 7, 8, 9 and 10 of the User Questionnaire. Items enumerated below refer to the items of the User Questionnaire Time Block Summary Sheet.

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FIGURE 3

User Questionnaire
TIME BLOCK SUMMARY SHEET

1. Library System _____ 2. Date _____

3. Terminal Location _____ 4. Time Block ___:___ - ___:___

5. Questionnaire Nos. _____ - _____ 6. Recruiter's Initials _____

7. Questionnaire Control:

   a. no. complete _____ b. no. incomplete _____ c. no. not used _____

   d. total (a+b+c) _____

8. Refusals

a. no. of refusals _____	b. total no. of male refusals _____	c. total number of female refusals _____
	1. aged 10-19 _____	1. aged 10-19 _____
	2. aged 20-29 _____	2. aged 20-29 _____
	3. aged 30-39 _____	3. aged 30-39 _____
	4. aged 40-49 _____	4. aged 40-49 _____
	5. aged 50-59 _____	5. aged 50-59 _____
	6. over 59 _____	6. over 59 _____

9. No. of Repeaters _____

10. No. of Nonusers _____

11. Problems

   a. Was time block cancelled?

      i. Yes _____

      ii. No _____ (skip to 11. c.)

   b. Reason(s) for cancelled time block _____

   _____

   _____

   _____

   c. General problems or comments _____

   _____

   _____

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(1) Library System. Syracuse = SYR; Ohio State = OHI; Dallas Public Library = DAL; Iowa City Public Library = IOW

(2) Date. Today's date

(3) Terminal Location. Same two-character code recorded on cover of user questionnaires; consult Study Supervisor if you are unsure.

(4) Time Block. Hours when data collection starts and finishes, e.g. 8:00 a.m.-12:30 p.m.

(5) Questionnaire Numbers. The range of 20 questionnaire serial numbers which you took to the data collection site.

(6) Recruiter's Initials. Same three-character code corresponding to data collector's initials, e.g. KKM, MKK, recorded on cover of questionnaires

(7a) Number of completed questionnaires at end of data collection period

(7b) Number of incomplete questionnaires at end of data collection period, i.e. questionnaire that respondent began to fill out but did not finish

(7c) Number of questionnaires not distributed to respondents

(7d) Total of adding 7a + 7b + 7c

(8a) Total number of people who refused to complete the questionnaire

(8b) How many of the refusals (8a) are male? And what age groups do these males (8b) represent?

(8c) How many of the refusals (8a) are female? And what age groups do these females (8c) represent?

(9) Number of Repeaters. How many people who refused had already filled out the questionnaire?

(10) Number of Nonusers. How many people refused to fill out the questionnaire because they had never used the computer catalog?

(11a) Record whether the time block was cancelled.

(11b) Explain in your own words the reasons for cancellation of the time block

(11c) General Problems or Comments. Describe any problems that occurred which may have affected the quality of data collected during the time block. If respondents had problems with specific questions, these problems can be listed here.

2.4.9 Return Data Collection Materials

After all questionnaires have been accounted for, placed in ascending serial number order, post-coded, the Time Block Segment Tally forms and Summary Sheets completed, the Data Collector makes one final visual inspection of the terminal location to make sure that she has left it in good order, retrieved signs and departs. Finally, the Data Collector returns all items to the Study Supervisor or to the secure storage area provided by the Supervisor. Unused study forms and questionnaires are redistributed into piles of unused forms of the same kind so that they can be used in the next data collection period.

2.4.10 Computer Down Time

The Data Collector should notice if the Computer System fails which will cause the computer catalog to go "down," i.e. become inoperable or unresponsive. Signs that the computer is "down" are usually obvious, i.e. disgruntled users, long response time on the system, uninterpretable system responses. Data Collectors might choose to perform a search to verify whether the computer is down.

If the computer comes "up" (or becomes responsive) within three to five minutes of going down, continue to recruit users but report the computer failure on the Time Block Summary Sheet. Down time exceeding 5 minutes should be reported on the Time Block Summary Sheet and data collection terminated for that segment. The Data Collector can take a break of 25 minutes. If the Data Collector leaves the site, data collection materials should be collected and stored in a secure place until the data collector returns.

The computer must be up for at least 15 minutes for data collection to resume. The Data Collector may be in a "standby" position until 30 minutes before the end of the Time Block. If the system is not up 30 minutes before the end of the Time Block, the Data Collector closes the data collection site (see section 2.4.6) and makes the appropriate reports (see sections 2.4.7 - 2.4.9).

2.5 How to Recruit Nonusers

A "nonuser" is a person who states that she has never used the library system's computer catalog when approached by the Data Collector in a library building with computer catalog terminals.

2.5.1 Obtain Data Collection Materials from Storage Area

At the designated time and day, the Data Collector fetches the data collection materials from the storage area. Before he proceeds to the assigned library location, the Data Collector makes sure that he has for a five-hour time block (the number of questionnaires and Time Block Segment

Tally Forms varies according to length of time block; figure 4 questionnaires per hour):

(1) 20 nonuser questionnaires

(2) 1 nonuser questionnaire Time Block Summary Sheet

(3) 4 nonuser questionnaire Time Block Segment Tally Forms

(4) 1 general notice "Computer Catalog Study in Progress" sign

(5) 2-3 tabletop "Reserved" signs

(6) Sign to attach to box for completed questionnaires

(7) Box for completed questionnaires

(8) ID badge with Data Collector's name

(9) Supply of #2 pencils

(10) Clipboard

(11) Watch or timepiece

2.5.2 Set Up Data Collection Site

The Data Collector arrives at the data collection site which is near computer catalog terminals. He places tabletop "Reserved" signs on the table set aside as a work station for nonusers who will complete questionnaires and posts the general notice "Computer Catalog Study in Progress" sign in a conspicuous location. Putting on his ID badge, the Data Collector makes sure that questionnaires are in ascending numerical order and he has related paper materials, e.g. Tally Forms, Summary Forms, close at hand or attached to the clipboard. When the Data Collector is ready, he fills in the first seven items on the Time Block Segment Tally Form (figure 4) and begins to recruit nonusers.

2.5.3 Recruit Nonusers

The Data Collector mentally notes the first person to leave the card catalog area or walk through the library entrance (depending upon the location of the data collection site at the card catalog or a main library entrance). Then the Data Collector approaches the next person who leaves the card catalog area or walks through the library entrance. He says:

> "Hello, I'm ___(name)___. The library is taking part in a national study of computer catalogs. Please take a few minutes to fill in this questionnaire [handing questionnaire to prospective respondent] about the

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FIGURE 4
Nonuser Questionnaire
TIME BLOCK SEGMENT TALLY FORM

1. Library System _____ 2. Date _____
3. Library Location _____ 4. Time Block ___ : ___ - ___ : ___
5. Recruiter's Initials _____ 6. Segment number _____
7. Time Recruiting Begun ___ : ___

Nonuser Acceptance	Questionnaire Number	Time Now	
			Refusals:
1			
			Refusals:
2			
			Refusals:
3			
			Refusals:
4			
			Refusals:
5			

8. Time at Completion of Segment ___ : ___

library's catalogs if you have NEVER [emphasize] used the library's computer catalog."

2.5.3.1 If the Prospective Respondent Declines . . .

Respondents who decline outright will most likely be those who use the computer catalog. Others will decline for other reasons, for example, saying, "Already filled one out," "Gotta go, have a class," "Don't want to," etc. Most people will appear to want more information about the study like the time required to complete a questionnaire (see section 2.5.3.3). For persons who decline outright or decline because they use the computer catalog, reply: "Thank you very much," and let the person go on her way. The Data Collector refers to the Time Block Segment Tally Form marked "Refusals" above the last nonuser acceptance number. (If no one has accepted a nonuser questionnaire yet, refer to the "Refusal" area above the number "1". Record the refusal with a hash mark, then resume the process of recruiting nonusers (see section 2.5.3).

2.5.3.2 If the Respondent Accepts . . .

Few respondents will accept outright, for example, saying, "of course," "Yes," etc. Most people will appear to want more information about the study (see section 2.5.3.3). For pesons who accept outright, the Data Collector might want to doublecheck to make sure the respondent has never used the computer catalog and reply:

> "Here's a questionnaire for people who have never used the computer catalog, [escorting her to work station] somewhere to sit, and a pencil to fill it out. When you finish please put the questionnaire in the box marked "Please Put Questionnaires Here."

Refer to the Time Block Segment Tally Form, mark down the questionnaire number you have just given to the nonuser (just subtract one from the next questionnaire to be given away) and record the time.

The Data Collector then resumes the process of recruiting nonusers (see section 2.5.3) unless he has recruited five nonusers to complete the questionnaire. If he has recruited five nonusers, he marks the time on the bottom of the Tally Form, item #8. The Time Block Segment Tally Form is complete for this segment of the Time Block.

To take a break, the Data Collector must wait until nonusers complete the questionnaire to leave the library location. When nonusers have completed and deposited the questionnaires, the Data Collector can leave the terminal location as long as materials are secure (in view of another library staff member, taken down and collected, etc.). The break may range from 0 to 15 minutes. When the Data Collector

returns from his break, he may have to set up some materials and signs. He begins a new Time Block Segment Tally Form by completing the first seven items of information; the segment number (item #6) will be 2 if the Data Collector has recruited five nonusers so far, or 3 if the Data Collector has recruited ten nonusers so far, etc. The Data Collector then resumes the process of recruiting nonusers (see section 2.5.3).

2.5.3.3 If the Prospective Respondent Wants More Information . . .

Possible respondent inquiries and Data Collector responses are:

R: I've used it only once for a class on how to use it.
DC: Thank you very much. Today, we are only interested in finding people who have never used it.

or

R: I've never used this one but I used the one at University of Antarctica.
DC: Then please fill out this questionnaire [handing her a nonuser questionnaire].

(See Section 2.4.3.3 for other questions and answers).

At the completion of the inquiry or negotiation, the prospective respondent may accept (see section 2.5.3.2) or decline (see section 2.5.3.1). Remember to record the respondent's action as an acceptance or refusal on the Time Block Segment Tally Form.

2.5.4 Handling Questions from Nonusers

(See Section 2.4.4)

2.5.5 Post-Questionnaire Interviews with Nonusers

(See section 2.4.5)

2.5.6 Closing Up the Data Collection Site

(See section 2.4.6)

2.5.7 Post-Coding Nonuser Questionnaires

After closing up the data collection site, the Data Collector finds a comfortable working area where he can spread out nonuser questionnaires and Time Block Summary Sheets to post-code information on the covers of questionnaires. Follow these steps:

(1) Arrange completed nonuser questionnaires in ascending numerical order

(2) Refer to cover of nonuser questionnaires in box marked "Office Use Only"

(3) For every questionnaire, fill in circles corresponding to Library System (Syracuse = SYR; Ohio State = OHI; Dallas Public Libraries = DAL; Iowa City Public Libraries = IOW)

(4) For every questionnaire, fill in circles corresponding to location (consult Study Supervisor if you are uncertain)

(5) For every questionnaire, fill in circles corresponding to the Data Collector's initials (use "x" if you have no middle name)

(6) For every questionnaire, fill in circles corresponding to today's date

(7) Spot-check the completed questionnaires. If questionnaires are mutilated or contain a lot of extraneous markings, record their serial numbers (on cover page, botton right corner) and nature of the mutilation on the Time Block Summary Sheet, item #9c, "General Problems or Comments."

2.5.8 Complete Time Block Summary Sheet

When the Data Collector completes the Time Block Summary Sheet (see figure 5) he refers to items 7, 8, and 9 of completed Time Block Segment Tally Forms. Items enumerated below refer to the numbered items of the Nonuser Questionnaire Time Block Summary Sheet.

(1) Library System. Syracuse = SYR; Ohio State = OHI; Dallas Public Library = DAL; Iowa City Public Library = IOW

(2) Date. Today's date

(3) Library Location. Same two-character code recorded on cover of nonuser questionnaires. (consult Study Supervisor if you are unsure).

(4) Time Block. Hours when data collection starts and finishes, e.g. 10:00 a.m. - 1:30 p.m.

(5) Questionnaire Numbers. The range of 20 questionnaire serial numbers which you took to the data collection site.

(6) Recruiter's Initials. Same three-character code corresponding to Data Collector's initials, e.g. KKM, MKK, recorded on cover of questionnaires.

APPENDIX G

FIGURE 5

Nonuser Questionnaire
TIME BLOCK SUMMARY SHEET

1. Library System_____ 2. Date_____

3. Library Location_____ 4. Time Block ___:___ - ___:___

5. Questionnaire Nos. _____ - _____ 6. Recruiter's Initials_____

7. Questionnaire Control:

   a. no. complete _____ b. no. incomplete _____ c. no. not used _____

   d. total (a+b+c) _____

8. No. of Refusals _____

9. Problems

   a. Was time block cancelled?

      i. Yes _____

      ii. No _____ (skip to 9. c.)

   b. Reason(s) for cancelled time block _____

   _____

   _____

   _____

   _____

   c. General problems or comments _____

   _____

   _____

   _____

   _____

   _____

   _____

(7a) Number of completed questionnaires at end of data collection period.

(7b) Number of incomplete questionnaires at end of data collection period, i.e. questionnaires that respondents began to fill out but did not finish

(7c) Number of questionnaires not distributed to respondents

(7d) Total of adding 7a + 7b + 7c

(8) Number of Refusals. How many persons refused to fill out questionnaire regardless of reasons. Refer to "Refusals" area on Time Block Segment Tally Forms and add all hash marks

(9a) Record if the Time Block was cancelled.

(9b) Explain in your own words the reasons for cancellation of the time block.

(9c) General Problems or Comments. Describe any problems that occurred which may have affected the quality of data collected during the time block, e.g. noise, traffic between classes, slow response time, etc. If respondents had problems with specific questions, these problems can be listed here.

2.5.9 Return Data Collection Materials

(See section 2.4.9)

Part 3
Supervision of Data Collection Procedures

3.1 Selecting Data Collectors

Study Supervisors are responsible for the selection of Data Collectors since they are familiar with their library's staff and staff availability. Study Supervisors should choose Data Collectors who possess the following attributes:

1. Completely honest in work
2. Reliable, conscientious and responsible
3. Utterly objective and neutral in manner
4. Interested in people; understanding
5. Able to inspire people's confidence and put them at ease
6. Inconspicuously, but neatly dressed

3.2 Training of Data Collectors

The Study Supervisor is responsible for training Data Collectors and may choose to train them individually or in a group. Part 2 of this Manual is written with the Data Collector in mind and can be given to Data Collectors to read before a training session with the Study Supervisor and to consult during the Data Collection process; however, reading Part 2 of the Manual does not substitute for a training session. If a training session cannot be arranged before Data Collection, the Data Collector must read Part 2 of the Manual and discuss any questions about the Manual with the Study Supervisor.

A training session for Data Collectors is presented by the Study Supervisor. Before the training session Data Collectors are given Part 2 of the Manual, User and Nonuser Questionnaires to read. The agenda of the training session covers:

1. Background of the Project. Highlight main points of section 1.1 of the Manual and the Information Sheet.
2. Schedule. Inform Data Collectors that you will provide them with a schedule of the days, times, library location (or terminal location for user questionnaires) when they will recruit respondents. On their schedule, the codes corresponding to days, times, locations, etc., will be listed so that they can transfer this information to the covers of questionnaires when post-coding (see sections

2.4.7-2.4.8 and 2.5.7-2.5.8).

3. User Questionnaire. Walk through the process of administering the user questionnaire by following sections of the Manual:

   a. 2.4.1. Where to obtain materials and what materials to obtain.

   b. 2.4.2. How to set up the Data Collection Site

   c. 2.4.3. How to Recruit Users and their possible responses to the Data Collector's recruitment effort

   d. 2.4.4. How to Handle Questions from Users

   e. 2.4.5. Purpose of Post-Questionnaire Interviews

   f. 2.4.6. How to Close Up the Data Collection Site

   g. 2.4.7. How to Post-Code User Questionnaires. Refer to information provided by Supervisor in the schedule.

   h. 2.4.8. How to Complete the Time Block Summary Sheet

   i. 2.4.9. Where to Return Data Collection Materials

   j. 2.4.10. What to do When the Computer Catalog Goes Down

4. Nonuser Questionnaire. Walk through the process of administering the nonuser questionnaire by following sections of the Manual:

   a. 2.5.1. Where to obtain Materials and what Materials to Obtain

   b. 2.5.2. How to set up the data collection site

   c. 2.5.3. How to recruit nonusers and their possible responses to the Data Collector's recruitment effort

   d. 2.5.4. How to Handle Questions from Nonusers

   e. 2.5.5. Purpose of Post-Questionnaire Interviews

   f. 2.5.6. How to Close Up Data Collection Site

   g. 2.5.7. How to Post-Code Nonuser Questionnaires

h. 2.5.8. How to Complete the Time Block Summary Sheet

i. 2.5.9. Where to Return Data Collection Materials

5. Problems

a. Data Collector illness or unable to recruit during his scheduled time block. Action: notify Study Supervisor.

b. Frequent computer catalog down time. Action: report on Time Block Summary Sheet; consult section 2.4.10 of Manual, close up data collection site if necessary.

c. Some questionnaires missing. Action: report on Time Block Summary Sheet.

d. All 20 questionnaires not used up at end of time block. Action: report on Time Block Summary Sheet; close up data collection site at end of time block; return unused questionnaires in ascending numerical order to respective pile of unused questionnaires in storage area.

6. Practice Recruiting Users and Nonusers. The Study Supervisor gives Data Collectors 2 copies of the user questionnaire (or nonuser questionnaire), 1 copy of the Time Block Segment Tally Form, 1 copy of the Time Block Summary Sheet, and ID Badges. The Study Supervisor assigns the Data Collectors to a particular library and terminal location (or library location for nonuser recruitment). The Data Collectors recruit 2 users (or nonusers) to complete the questionnaires and fill out the Tally Form and Summary Sheet just like they were performing the actual study. The Study Supervisor intermittently and unobtrusively observes the Data Collectors. Data Collectors and Study Supervisor meet at the Training Room to debrief, ask questions, and, if necessary, review procedures.

3.3 Receiving, Storage and Return of Data Collection Materials

The Study Supervisor is sent data collection materials (see section 1.5) by the Study Coordinator. The only materials which the Supervisor supplies are chairs and a table at the data collection site which is used as a work station for respondents completing questionnaires, clipboard, no. 2 pencils, and watch (or timepiece).

We suggest the Study Supervisor arranges Data Collection Materials, e.g. user questionnaires, nonuser time block summary sheets, etc., in separate piles so that Data Collectors can return unused materials to their respective pile at the end of the data collection period. Materials should be stored in a safe but accessible (to Data Collectors) area.

Every one or two weeks the Study Supervisor sends completed questionnaires and Supervisor's Report Form to:

Ms. Betsy Lloss-Sandor
University of California/Division of Library Automation
186 University Hall
Berkeley, CA 94720

The Supervisor's Report Form (see figure 6) is completed by the Study Supervisor and enumerates the week's problems and actions taken to remedy the problems. Most of the information is derived from User and Nonuser Time Block Summary Sheets, especially items 11c and 9c, respectively. Supervisors need not fill in the "comments" or "actions" columns of every Time Block if no problems occurred, nor need they respond to the open-ended "ideas" question if no ideas occurred to them during the particular data collection period.

The UC/DLA facility has been designated by the Council on Library Resources as the Central Collection and Analysis Agency of the national study. If any problems occur with respect to mailing, write or call Betsy (415-642-9485) or Karen Markey at OCLC (800-848-5800, ext. 6082).

Every one or two weeks, Time Block Segment Tally Forms and Time Block Summary Sheets should be sent to:

Karen Markey
Office of Research
OCLC
6565 Frantz Road
Dublin, OH 43017

Since libraries will be participating in later phases of the study, Study Supervisors keep signs and ID Badges. Materials should be sent at least every two weeks so that completed forms do not get lost in the storage area. A bulk mailing of all completed forms is risky given the track record of the U.S. Postal Service, especially during holiday seasons.

3.4 Problems: Down Time, Illness of Data Collectors, etc.

Procedures for Down Time are given in section 2.4.10. User Questionnaires completed during Time Blocks in which computer failures occur are still included in the analysis. The sampling schedule was constructed with problems in mind which may result in a missed time block. If all time blocks in the sampling schedule are used up and questionnaires remain unused, the Study Coordinators (Kasha or Markey) should be contacted. Likewise, if all questionnaires are used and time blocks remain, data collection is complete!

3.5 Quality Control

The utility of the entire study ultimately depends on the extent of compliance with procedures and the completeness and accuracy of information reported on

APPENDIX G

FIGURE 6

SUPERVISOR'S REPORT FORM

Supervisor _____

Library _____

Date of Time Block	Comments (if any)	Action Taken (if any)

Note any ideas or suggestions for improving data collection in your libraries or for the study as a whole which may have occurred to you during the week. (Use reverse side if necessary).

60

the questionnaires. It is hoped that Study Supervisors take care to monitor and maintain the quality of the Data Collector's efforts. These measures include:

1. Making certain that Data Collectors are adequately trained before data collection begins.

2. Observing the Data Collector intermittently.

3. Reviewing Questionnaires and Time Block Summaries Sheets submitted by Data Collectors after every time block. Questionnaires should be checked to be sure that all control information is complete and correct, all items have been completed, no extraneous marks appear which would interfere with machine entry of questionnaire data; and there are no tears or wrinkles. Time Block Summary Sheets should be checked for completion and consistency.

3.6. Contacts at OCLC

Study Coordinators at OCLC are Neal Kaske and Karen Markey. Their addresses and telephone numbers are:

Neal K. Kaske
Director
Office of Research
OCLC
6565 Frantz Road
Dublin, OH 43017
800-848-5800, ext. 6090

Karen Markey
Research Scientist
Office of Research
OCLC
6565 Frantz Road
Dublin, OH 43017
ext. 6082

APPENDIX H

DATA COLLECTION MANUAL

ONLINE PUBLIC ACCESS SYSTEMS PROJECT
Office of Research
OCLC, Inc.
6565 Frantz Road
Dublin, OH 43017

February 1982

Markey Revision of the Pilot Test Data Collection Manual of the Public Online Catalog Study by The Research Libraries Group in October 1981

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APPENDIX H

Part 1
General Information About the Project

1.1 An Introduction to Online Public Access Systems: Data Collection and Analysis

The Online Public Access Systems Project is part of a national study to increase general knowledge and understanding about patron use of computer catalogs in American academic, research, and public libraries. The national study is funded by grants from the Council on Library Resources, Washington, D.C. to a consortium of library research, service, and education organizations including: The Library of Congress; Joseph Matthews & Associates, OCLC Online Computer Library Center, Inc.; The Research Libraries Group, Inc. (RLG); and the University of California, Division of Library Automation (UC/DLA).

Study design and planning began in December, 1980. The basic strategy is to use self-administered questionnaires to acquire information from samples of computer catalog users and nonusers in academic, research, and public libraries where online public access catalogs are available for public searching. Questionnaires will be analyzed to find out how users search the computer catalog, what problems they have, and what new features of the computer catalog they would like. Information acquired through the analysis will assist libraries in the transition from card to online catalogs and offer recommendations for the design of new online catalogs and the enhancement of existing ones.

1.2 Data Collection Manual

This Data Collection Manual was prepared by RLG and then revised by OCLC to serve as the basic reference and training document for OCLC's Pilot Test of the questionnaires during November and December of 1981. The final revision of the manual was done in Winter 1982 to accommodate changes in procedures for the Full Study Survey in Spring 1982.

This Manual will be used by those having any one of the three study roles as defined in Section 1.3, namely:

(1) Study Coordinators (Kaske and Markey)

(2) Library Supervisors (Ingersoll, McPhee, Miller, and Bearden, etc.)

(3) Data Collectors

By following this Manual, we are striving to assure that data collection procedures are uniform for the eleven library systems participating in the Full Study Survey. The Manual can be used to clarify communication and to coordinate activities among Study

Coordinators, between Library Supervisors and Study Coordinators, and between Data Collectors and Library Supervisors. It can help Library Supervisors when training Data Collectors or serve as a ready reference guide to clarify procedures. Finally, the Manual may help resolve uncertainties or issues in analyzing the data collected, to document in advance what data was sought, and what procedures were specified to collect that data.

The Manual contains three parts. Part 1 describes general information about the study. Part 2 is addressed to Data Collectors and walks through the process of recruiting users and nonusers; this part can be used to train Data Collectors. Part 3 highlights the responsibilities of Library Supervisors, particularly the training of Data Collectors.

1.3 Individuals Responsible for Data Collection

Three roles with corresponding responsibilities are involved in the data collection effort:

STUDY COORDINATOR (Kaske and Markey). The Library Supervisor's principal contact about the Project. Provides Questionnaires, Data Collection Schedules, forms, signs, and procedures about the data collection process to the Library Supervisor. Supports Supervisor prior to and during the study concerning activities and problems. Provides whatever other information, guidance, or assistance the Library Supervisor may require.

LIBRARY SUPERVISOR (e.g. Ingersoll, McPhee, Miller and Bearden). Organizes and manages all data collection activities for the study in his Library System. Recruits, selects, trains, coordinates and oversees the activities of the Data Collectors. Receives, stores and is responsible for the return of questionnaires, forms, and other materials provided by the Study Coordinator. Is responsible for Data Collectors' compliance with Data Collection Schedule and Procedures. Provides other necessary administrative materials, e.g. pencils, clipboards. Reviews all completed questionnaires to ensure the completeness and satisfactory quality of data during collection. Handles inquiries about the Study. Makes certain that completed questionnaires are returned according to specified schedule. Keeps Study Coordinator currently and accurately informed about the progress and status of the data collection effort. Alerts Coordinator whenever any significant problems occur and works with the Coordinator to resolve problems. May take on role of Data Collector.

DATA COLLECTOR. Under the Supervisor's direction, the Data Collector is responsible for actual collection of data from users and nonusers of computer catalogs at terminal and library

locations during predetermined time blocks. Recruits, selects, and screens respondents to complete questionnaires; checks questionnaires for completeness and submits them to storage area or Supervisor after each time block covered. For each time block, completes Time Block Report Forms which record questionnaire control information, and acceptance and refusal statistics. Reports any problems which disrupt data collection or may affect the quality of data being collected.

1.4 Orientation of Library Staff and the Community

Successful data collection in the library can be aided by understanding and support of library staff and patrons. Natural curiosity as to the nature and purpose of the study will be aroused when data collection begins. Library Supervisors may elect to disseminate information about the study in the form of:

Information Sheet: An information sheet describing the study has been prepared by OCLC. We suggest that Library Coordinators post the sheet on bulletin boards in the library and other appropriate areas such as reference desks, or information desk to give to persons inquiring about the study.

News Release: The Information Sheet also serves as a news release about the study. Library Supervisors can notify campus and community media about the study by sending them a cover letter accompanied by the Information Sheet.

Staff Meeting Presentation: Library Supervisors may elect to make a brief presentation about the Study at a regularly scheduled library staff meeting.

1.5 Data Collection Materials

A specific set of forms, materials, and supplies is required for the data collection effort. Questionnaires are the fundamental data collection instrument, and are provided to the library in the quantity required. Copies of other forms are provided to the library by OCLC. All necessary forms, materials, and supplies are itemized below. (S) after an item means that the item will be provided by OCLC in sufficient quantity. (L) after an item means that the item is provided by the participating library.

(1) Sampling Schedule (S)

(2) User Questionnaires (S)

4

(3) Nonuser Questionnaires (S)

(4) User Questionnaire Time Block Report Form (S)

(5) Nonuser Questionnaire Time Block Report Form (S)

(6) General Notice "Computer Catalog Study in Progress" Sign (S)

(7) Reserved tables/chairs at data collection site (L)

(8) Tabletop "Reserved" signs (S)

(9) Box for completed questionnaires (L)

(10) Sign to attach to box for completed questionnaires (S)

(11) Data Collector's ID Badge (S)

(12) Supply of #2 pencils (L)

(13) Clipboard (L)

(14) Timepiece or watch (L)

(15) Supervisor's Report Forms (S)

(16) Data Collection Manual (S)

(17) Abridged Data Collection Manual for Data Collector Training (S)

(18) Information Sheet (S)

Part 2
Pilot Test Procedures for the Data Collector

2.1 General Information About Data Collector Procedures

The Data Collector recruits users of the computer catalog at computer catalog terminal locations to complete a multiple-choice user questionnaire. Nonusers are recruited to complete a multiple-choice nonuser questionnaire at library entrances. When the Data Collector has recruited his quota of users or nonusers or the time block period ends, the Data Collector removes data collection materials like signs, tables, etc., from the collection site and completes control information on questionnaires and report forms.

2.2 Time Block Scheduling

Library Supervisors have received Time Block Schedule Worksheets (figure 1) upon which they have recorded libraries, dates, and times when data collection can take place. Study Coordinators have drawn up a Schedule of Time Blocks which is intended to obtain a representative sample of the library's users as respondents to the user and nonuser questionnaires.

The Time Block Schedule lists type of questionnaire, library location, terminal location (user questionnaire only), library entrance (nonuser questionnaire only), dates, and times when data collection will take place. It is constructed to allow for the completion of at least 120% of the total number of questionnaires per library; when 100% of the total number of questionnaires have been completed, data collection stops even though more time blocks may be listed on the schedule. Data collection will take place during these extra time blocks when problems, e.g. computer down time, illness of data collectors, etc., occur during previously scheduled time blocks.

The Library Supervisor assigns Data Collectors to time blocks and informs Data Collectors about their assignments. The notification includes type of questionnaire, date, time block, library and specific area in the library (e.g. card catalog, entrance, etc.); the last two types of information are assigned codes so that the codes are transferred onto back covers of questionnaires during post-coding (see sections 2.3.7 - 2.3.8 and 2.4.7 - 2.4.8).

1 Library/Regular hours	2 Hours of Main Entrance	3 Name of Terminal Location	4 No. of Terminals	5 Dates of Recruitment	6 Hours of Recruitment
Joseph A. Doe Memorial Library 9am - 9pm, Mon - Thurs 9am - 6pm, Fri 9am - 5pm, Sat.	SW	card catalog	2	Nov. 9 Nov. 10 Nov. 11, 12 Nov 13 Nov. 14 Nov. 15 ...	9am - 10am, Noon - 3pm 9am - 10am, 3pm - 8pm 9am - 1pm None 1pm - 5pm 9am - 10am, 3pm - 4pm ...
Joseph A. Doe Jr. Reference Branch Library 1 am - 9am, Mon - Fri Midnite - 9am, Sunday	Bluebird St. North	Periodicals Attic 1st Floor, card catalog 2nd Floor 3rd Floor 4th Floor 5th Floor 6th Floor	1 3 1 1 1 1 1 1	Nov. 9 Nov. 10 Nov. 11 Nov. 12 - 13 Nov. 15 ...	1am - 9am 1am - 4am None 3am - 6am Midnite - 6am ...
...	...	...	...	...	...

! EXAMPLE !

Figure 1

2.3 How to Recruit Users

A "user" is a person observed using the computer catalog, i.e. sitting or standing in front of computer catalog and touching keys or screen, looking at a display device, referring to display device to write something down, etc. Users are nabbed for participation in the computer catalog study when they leave the terminal.

2.3.1 Obtain Data Collection Materials from Storage Area

At the time and day designated by the Library Supervisor, the Data Collector fetches the Data Collection Materials from the storage area. Before she proceeds to the assigned terminal location, the Data Collector makes sure that she has the following materials for a TWO-hour time block:

(1) 10 User Questionnaires

(2) 1 User Questionnaire Time Block Report Form

(3) 1 General Notice "Computer Catalog Study in Progress" sign

(4) 2 Tabletop "Reserved Computer Catalog Study in Progress" signs

(5) Sign to attach to box for Completed Questionnaires

(6) Box for completed questionnaires

(7) ID Badge with Data Collector's name

(8) Supply of No. 2 pencils

(9) Clipboard

(10) Watch or timepiece

2.3.2 Set up Data Collection Site

The Data Collector arrives at the data collection site which is near computer catalog terminals. She places tabletop "Reserved for Computer Catalog Study" signs on the table set aside as a work station for users who will complete questionnaires and posts the general notice "Computer Catalog Study in Progress" sign in a conspicuous location. Putting on her ID badge, the Data Collector makes sure that questionnaires are in ascending numerical order and she has a Report Form close at hand or attached to her clipboard. When

the Data Collector is ready, she fills in the first seven items on the Time Block Report Form (figure 2) and begins to recruit users. These first seven items and the types of information required to complete them are as follows:

#1. Library System. Three-letter code of the library system, e.g. Case Western Reserve=CAS, Dallas Public=DAL, Iowa City Public=ICW, Ohio State University=OHS, Syracuse University=SYR, etc.

#2. Date. Today's date.

#3. Terminal Location. Two-letter code designated by the Library Supervisor which describes the location of the terminals in the library system at which the Data Collector is recruiting.

#4. Time Block. Hours when data collection is scheduled to start and finish, e.g. 11:30 a.m. - 2:30 p.m.

#5. Questionnaire Numbers. The range of user questionnaire numbers which the Data Collector took to the terminal location.

#6. Recruiter's Initials. Two-letter code of Data Collector's initials

#7. Time Recruiting Begun. The exact time when the Data Collector begins to recruit users.

2.3.3 Recruit Users

The Data Collector approaches the first person who leaves a computer catalog terminal to fill out a user questionnaire. She says:

> "Hello, I'm (name). The library is taking part in a national study of computer catalogs. Please take a few minutes to fill in this questionnaire [handing questionnaire to prospective respondent] about the library's catalogs."

2.3.3.1 If The Prospective Respondent Declines . . .

Few prospective respondents will decline outright, for example, saying "Gotta go, have a class," "Who cares?" "Don't bother me" (or words to that effect). Most people will appear to want more information about the study like the time required to complete a questionnaire (see section 2.3.3.3). For persons who decline

APPENDIX H

Exit Questionnaire
TIME BLOCK REPORT FORM

Figure 2

1. Library System PSD
2. Date APRIL 1, 1982
3. Library Location PM
4. Time Block 2:00 p.m. - 5:00 p.m.
5. Questionnaire Nos. 6204 - 6218
6. Recruiter's Initials K M
7. Time Recruiting Began 2:06
8. Acceptances:

8a. User Acceptance	8b. Questionnaire No.	8c. Time Now
1	6204	2:10
2	6205	2:30
3	6206	2:32
4	6207	2:35
5	6208	3:02
6	6209	3:15
7	6210	3:32
8	6211	3:54
9	6212	4:06
10	6213	4:11
11	6214	4:35
12	6215	4:37
13	6216	4:49
14		
15		
16		
17		
18		
19		
20		

9. Refusals:

9a. Refusals who are Users: |||| |||| |||| ||
TOTAL=

9b. Refusals who are Nonusers: ||
TOTAL=

9c. Refusals who have already filled out questionnaire: |
TOTAL=

10. Time Recruiting Ended: 4:49

11. Questionnaire Control:

a. No. Complete
b. No. Incomplete
c. No. Not Used
d. Total (a+b+c)

12. If Time block was cancelled, give reason(s) for cancellation

13. General Problems or Comments

outright, reply: "Thank you very much," and let the person go on his way. The Data Collector refers to the Time Block Report Form, item #9, "Refusals," and makes a hashmark in refusal row corresponding to the person's reason for refusing, e.g. row #9a if the person was a user, #9b if the person was a nonuser, or row #9c if the person had already completed a questionnaire at another time.

The Data Collector then resumes the process of recruiting users (see section 2.3.3.).

2.3.3.2. If the Respondent Accepts . . .

Few respondents will accept outright, for example, saying, "Of course," "Yes," etc. Most people will appear to want more information about the study (see section 2.3.3.3). For persons who accept outright, reply:

> "Here's a questionnaire, [escorting him to work station] somewhere to sit, and a pencil to fill it out. When you finish please put the questionnaire in the box marked "Please put Questionnaires Here."

The Data Collector refers to the Time Block Report Form, item #8, "Acceptances." She marks down the questionnaire number she has just given to the user (just subtract one from the next questionnaire to be given away) in column #8b and records the time in column #8c.

The Data Collector then resumes the process of recruiting users (see section 2.3.3). If the Data Collector has recruited her quota of questionnaire acceptances, or the time for the end of the time block is reached, the Data Collector terminates the time block by recording the time in item #10, "Time Recruiting Ended," of the Time Block Report Form. Then she closes down the data collection site (see section 2.3.6).

2.3.3.3 If the Prospective Respondent Wants More Information . . .

Possible respondent inquiries and Data Collector responses are:

R: How long will it take?
DC: About 15 minutes.

or

R: What's it for?

9

DC: A national project to study and analyze computer catalogs.

or

R: I don't know anything about computers
DC: We'd like to find out your opinions and expectations of this library's computer catalog which you just used.

or

R: Can I take it home?
DC: Because it refers to what you just did on the computer catalog, we feel it would be easier for you to fill it out right here.

or

R: I've already filled one out.
DC: Thank you very much. [Note: The Data Collector marks this instance on the Time Block Report Form, item #9c "Refusals" who have already filled out a questionnaire.]

or

R: But I'm a library staff member.
DC: We are only surveying library patrons today. Thank you anyway. [Note: The Data Collector does not record a library staff member as a "refusal" or "acceptance".]

or

R: [Volunteering] Can I fill one out?
DC: Sure. Thank you. [Note: Record the questionnaire number of this volunteer on the Time Block Report Form and separate his questionnaire from the others at the end of the Time Block. We may use these volunteer questionnaires at a later time but they should be pointed out to the Library Supervisor on the Time Block Report Form, item #13, "General Problems or Comments".]

or

R: Who is supporting the study?
DC: The Council on Library Resources in Washington, DC, has given a grant to OCLC (or Online Computer Library

Center) in Ohio who administers the study in our library.

At the completion of the inquiry or the negotiation, the prospective respondent may accept (see section 2.3.3.2) or decline (see section 2.3.3.1). Remember to record the respondent's action as an acceptance or refusal on the Time Block Report Form.

2.3.4 Handling Questions from Users

When respondents are completing the questionnaire, they may ask the Data Collector questions about the instrument. Questions may be about the mechanics of filling out the questionnaire or about the meaning of questions. In the case of the former, advise the respondent to reread the instructions of the particular section of the questionnaire.

To handle meaning questions, reply to the respondent:

"Answer the question however you think it means."

If the respondent's difficulty is quite serious, jot down the problem on the Time Block Report Form, item #13, "General Problems or Comments."

2.3.5 How to Fill in the User Questionnaire Time Block Report Form During Data Collection

Figure 2 is an example of a User Questionnaire Time Block Report Form when the Data Collector has recruited her quota of 15 users during a time block. (Note: The length of time blocks varies among libraries; the example of Figure 2 was taken at a library whose time blocks spanned a three-hour period.) Items #1-#10 are complete except for Items #9a-#9c in which the Data Collector must total the number of refusals in each boxed item.

We suggest that Data Collectors refer to this example if they are unsure about filling in the form during the data collection process.

2.3.6 Closing Up the Data Collection Site

When the Data Collector has recruited her quota of acceptances to complete the questionnaire or the amount of time allocated to a Time Block has expired, the Data Collector is free to conclude the Time Block by refraining from recruitment activities. The Data Collector waits for the last person completing a questionnaire to deposit it in

the collection box, then takes down signs and rearranges furniture if necessary.

Before leaving the data collection site, the Data Collector must have in hand:

(1) 10 questionnaires

(2) 1 Time Block Report Form

(3) Signs: general notice and tabletop signs

(4) Deposit box labeled with sign

(5) ID Badge

(6) Supplies: #2 pencils, clipboard, watch

2.3.7 Post-Code Questionnaires

After closing up the data collection site, the Data Collector finds a comfortable working area where she can spread out user questionnaires, tally forms and summary sheets, to post-code information on the covers of the questionnaires. Follow these steps:

(1) Arrange completed questionnaires in ascending numerical order

(2) Refer to back cover of questionnaires in box marked "Office Use Only"

(3) For every questionnaire, fill in the circles corresponding to today's date

(4) For every questionnaire, fill in the circles corresponding to the Data Collector's initials

(5) For every questionnaire, fill in the circles corresponding to the Terminal Location. (Refer to your schedule, or Time Block Report Form, item #3, or consult Library Supervisor if you are uncertain)

(6) For every questionnaire, fill in the circles corresponding to the Library System (Syracuse = SYR; Ohio State = OHI; Dallas Public Libraries = DAL; Iowa City Public Libraries = IOW, etc.)

(7) For every questionnaire, fill in the circles corresponding to the time when you gave the respondent the questionnaire (refer to the Time Block Report Form, items #8b and #8c, "Questionnaire No." and "Time Now," to obtain this information)

(8) Disregard the "Terminal I.D." circles

(9) Spot-check completed questionnaires. If questionnaires are mutilated or contain a lot of extraneous markings, record their serial numbers (on cover page, bottom right corner) and nature of the mutilation on the Time Block Report Form, item #13, "General Problems or Comments"

2.3.8 Complete the Time Block Report Form

At this moment, the Time Block Report Form should look like the example of Figure 2. Items #1-#10 are complete except for the "TOTAL" boxes in items #9a-#9c. How to complete the entire form is explained below. Figure 3 shows what the Time Block Report Form looks like when it is completed.

#9a. Total the number of "Refusals who are Users" and record the total in the box.

#9b. Total the number of "Refusals who are Nonusers" and record the total in the box.

#9c. Total the number of "Refusals who have already filled out the Questionnaire" and record the total in the box.

#11a. Number of completed questionnaires at end of data collection period.

#11b. Number of incomplete questionnaires at end of data collection period, i.e. questionnaire that respondent began to fill out but did not finish.

#11c. Number of questionnaires not distributed to respondents.

#11d. Total of adding 11a + 11b + 11c.

#12. If the time block was cancelled, explain in your own words the reasons for cancellation of the time block.

#13. General Problems or Comments. Describe any problems that occurred which may have affected the quality of data collected during the time block. If respondents had problems with specific questions, these problems can be listed here.

APPENDIX H

User Questionnaire
TIME BLOCK REPORT FORM

Figure 3

1. Library System: POD
2. Date: April 1, 1982
3. Library Location: PL
4. Time Block: 2:00 p.m. - 5:00 p.m.
5. Questionnaire Nos.: 6204 - 6218
6. Recruiter's Initials: K M
7. Time Recruiting Began: 2:06
8. Acceptances:

8a. User Acceptance	8b. Questionnaire No.	8c. Time Rec
1	6204	2:10
2	6205	2:30
3	6206	2:32
4	6207	2:35
5	6208	3:02
6	6209	3.15
7	6210	3:32
8	6211	3:54
9	6212	4:06
10	6213	4.11
11	6214	4:35
12	6215	4:37
13	6216	4:49
14		
15		
16		
17		
18		
19		
20		

9. Refusals:

9a. Refusals who are Users: |||| |||| |||| ||
TOTAL= 17

9b. Refusals who are Nonusers: ||
TOTAL= 2

9c. Refusals who have already filled out questionnaire: |
TOTAL= 1

10. Time Recruiting Ended: 4:49

11. Questionnaire Control:

a. No. Complete: 12
b. No. Incomplete: 1
c. No. Not Used: 2
d. Total (a+b+c): 15

12. If Time block was cancelled, give reason(s) for cancellation: N/A

13. General Problems or Comments: COMPUTER WENT DOWN MOMENTARILY AROUND 2:40 FOR ABOUT 5 MINUTES. I DIDN'T STOP RECRUITING BECAUSE COMPUTER WENT RIGHT BACK UP.

2.3.9 Return Data Collection Materials

After all questionnaires have been accounted for, placed in ascending serial number order, post-coded, the Time Block Report Form completed, the Data Collector makes one final visual inspection of the terminal or library to make sure that she has left it in good order, retrieved signs and departs. Finally, the Data Collector returns all items to the Library Supervisor or to the secure storage area provided by the Supervisor. Unused forms and questionnaires are redistributed into piles of unused forms of the same kind so that they can be used in the next data collection period.

2.3.10 Computer Down Time

The Data Collector should notice if the Computer System fails which will cause the computer catalog to go "down," i.e. become inoperable or unresponsive. Signs that the computer is "down" are usually obvious, i.e. disgruntled users, long response time on the system, uninterpretable system responses. Data Collectors might choose to perform a search to verify whether the computer is down.

If the computer comes "up" (or becomes responsive) within three to five minutes of going down, continue to recruit users but report the computer failure and time of day on the Time Block Report Form, item #13, "General Problems." Down time exceeding 5 minutes should be reported on the Time Block Report Form and data collection terminated for at least 25 minutes. If the Data Collector leaves the site, data collection materials should be collected and stored in a secure place until the Data Collector returns.

The computer must be up for at least 15 minutes for data collection to resume. If data collection resumes, the Data Collector marks down the time when data collection resumes on the Time Block Report Form, item #13, "General Problems or Comments." The Data Collector may be in a "standby" position until 30 minutes before the end of the Time Block. If the system is not up 30 minutes before the end of the Time Block, the Data Collector closes the data collection site (see section 2.3.6) and makes the appropriate reports (see sections 2.3.7 - 2.3.8).

2.4 How to Recruit Nonusers

A "nonuser" is a person who states that she has never used the library system's computer catalog when approached by the Data Collector in a library building with computer catalog terminals.

2.4.1 Obtain Data Collection Materials from Storage Area

At the designated time and day, the Data Collector fetches the data collection materials from the storage area. Before he proceeds to the assigned library location, the Data Collector makes sure that he has for a two-hour time block:

(1) 15 nonuser questionnaires

(2) 1 nonuser questionnaire Time Block Report Form

(3) 1 general notice "Computer Catalog Study in Progress" sign

(4) 2 tabletop "Reserved" signs

(5) Sign to attach to box for completed questionnaires

(6) Box for completed questionnaires

(7) ID badge with Data Collector's name

(8) Supply of #2 pencils

(9) Clipboard

(10) Watch or timepiece

2.4.2 Set Up Data Collection Site

The Data Collector arrives at the data collection site which is near a library entrance. He places tabletop "Reserved" signs on the table set aside as a work station for nonusers who will complete questionnaires and posts the general notice "Computer Catalog Study in Progress" sign in a conspicuous location. Putting on his ID badge, the Data Collector makes sure that questionnaires are in ascending numerical order and he has a Report Form close at hand or attached to the clipboard. When the Data Collector is ready, he fills in the first six items on the Time Block Report Form (figure 4) and begins to recruit nonusers. These first six items and the types of information required to complete them are as follows:

#1. Library System. Three-letter code of the library system, e.g. Case Western Reserve=CAS, Dallas Public=DAL, Iowa City Public=ICW, Ohio State University=OHI, Syracuse University=SYR, etc.

APPENDIX H

Boomer Questionnaire
TIME BLOCK REPORT FORM

Figure 4

1. Library System: POP
2. Date: April 1, 1982
3. Library Location: PU
4. Time Block: 11:00 a.m. - 2:00 p.m.
5. Questionnaire Nos.: 9709 - 9723
6. Recruiter's Initials: K.M.
7. Time Recruiting Began: 11:05 a.m.
8. Acceptances:

8a. Boomer Acceptance	8b. Questionnaire No.	8c. Time Now
1	9709	11:07
2	9710	11:11
3	9711	11:20
4	9712	11:30
5	9713	11:42
6	9714	11:49
7	9715	11:58
8	9716	12:06
9	9717	12:10
10	9718	12:20
11	9719	12:38
12	9720	12:42
13	9721	12:47
14	9722	12:52
15	9723	12:55
16		
17		
18		
19		
20		

9. Refusals:

9a. Refusals who are Boomers: 𝍸 |||

TOTAL=

9b. Refusals who are Others: 𝍸 𝍸 𝍸 𝍸 𝍸 𝍸 𝍸 |||

TOTAL=

9c. Refusals who have already filled out questionnaire:

TOTAL=

10. Time Recruiting Ended: 12:55 p.m.

11. Questionnaire Control:

a. No. Complete: _____
b. No. Incomplete: _____
c. No. Not Used: _____
d. Total (a+b+c): _____

12. If Time block was cancelled, give reason(s) for cancellation: _____

13. General Problems or Comments: _____

#2. Date. Today's date.

#3. Library Location. Two-letter code designated by the Library Supervisor which describes the location in the library where the Data Collector is recruiting.

#4. Time Block. Hours when data collection starts and finishes, e.g. 11:30 a.m. - 2:30 p.m.

#5. Questionnaire Numbers. The range of nonuser questionnaire numbers which the Data Collector took to the library location.

#6. Recruiter's Initials. Two-letter code of Data Collector's initials.

#7. Time Recruiting Begun. The exact time when the Data Collector begins to recruit nonusers.

2.4.3 Recruit Nonusers

Then the Data Collector approaches the first person who walks through the library entrance. He says:

> "Hello, I'm (name). The library is taking part in a national study of computer catalogs. Please take a few minutes to fill in this questionnaire [handing questionnaire to prospective respondent] about the library's catalogs if you have NEVER [emphasize] used the library's computer catalog."

2.4.3.1 If the Prospective Respondent Declines . . .

Respondents who decline outright will most likely be those who use the computer catalog. Others will decline for other reasons, for example, saying, "Already filled one out," "Gotta go, have a class," "Don't want to," etc. Most people will appear to want more information about the study like the time required to complete a questionnaire (see section 2.4.3.3). For persons who decline outright or decline because they use the computer catalog, reply: "Thank you very much," and let the person go on her way. The Data Collector refers to the Time Block Report Form, item #9b, "Refusals who are Users" and makes a hashmark in the space. If the person had refused but had never used the computer catalog, the Data Collector refers to the Time Block Report Form, item #9a, "Refusals who are Nonusers" and makes a hashmark in the space. For nonusers who refused because they had already completed the nonuser question, refer

to item #9c of the Report Form, record the refusal with a hashmark, then resume the process of recruiting nonusers (see section 2.4.3).

2.4.3.2 If the Respondent Accepts . . .

Few respondents will accept outright, for example, saying, "Of course," "Yes," etc. Most people will appear to want more information about the study (see section 2.4.3.3). For pesons who accept outright, the Data Collector might want to doublecheck to make sure the respondent has never used the computer catalog and reply:

> "Here's a questionnaire for people who have never used the computer catalog, [escorting her to work station] somewhere to sit, and a pencil to fill it out. When you finish please put the questionnaire in the box marked "Please Put Questionnaires Here."

Refer to the Time Block Report Form, mark down the questionnaire number you have just given to the nonuser (just subtract one from the next questionnaire to be given away) in column #8b and record the time in column #8c.

The Data Collector then resumes the process of recruiting nonusers (see section 2.4.3). If the Data Collector has recruited his quota of questionnaire acceptances, or the time for the end of the time block is reached, the Data Collector terminates the time block by recording the time in item #10, "Time Recruiting Ended," of the Time Block Report Form. Then he closes down the data collection site (see section 2.4.6).

2.4.3.3 If the Prospective Respondent Wants More Information . . .

Possible respondent inquiries and Data Collector responses are:

R: I've used it only once for a class on how to use it.
DC: Thank you very much. Today, we are only interested in finding people who have never used it.

or

R: I've never used this one but I used the one at

University of Antarctica.
DC: Then please fill out this questionnaire [handing her a nonuser questionnaire].

(See Section 2.3.3.3 for other questions and answers).

At the completion of the inquiry or negotiation, the prospective respondent may accept (see section 2.4.3.2) or decline (see section 2.4.3.1). Remember to record the respondent's action as an acceptance or refusal on the Time Block Report Form.

2.4.4 Handling Questions from Nonusers

(See Section 2.3.4)

2.4.5 How to Fill in the Nonuser Questionnaire Time Block Report Form during Data Collection

Figure 4 is an example of a Nonuser Questionnaire Time Block Report Form when the Data Collector has recruited his quota of 15 nonusers during a time block. (Note: The length of time blocks varies among libraries; the sample of Figure 4 was taken at a library whose time blocks spanned a three-hour period). Items #1-#10 are complete except for items #9a-#9c in which the Data Collector must total the number of refusals in each boxed item.

We suggest that Data Collectors refer to this example if they are unsure about filling in the form during the data collection process.

2.4.6 Closing Up the Data Collection Site

(See section 2.3.6)

2.4.7 Post-Coding Nonuser Questionnaires

(See section 2.3.7)

2.4.8 Complete the Nonuser Time Block Report Form

At this moment, the Time Block Report Form should look like the example of Figure 3. Items #1-#10 are complete except for the "TOTAL" boxes in items #9a-#9c. How to complete the entire form is explained below. Figure 5 shows what the Time Block Report Form looks like when it is completed.

#9a. Total the number of "Refusals who are Nonusers" and record the total in the box.

APPENDIX H

Screener Questionnaire
TIME BLOCK REPORT FORM

Figure 5

1. Library System: TOD
2. Date: APRIL 1, 1982
3. Library Location: PH
4. Time Block: 11:00 a.m. - 2:15 p.m.
5. Questionnaire Nos.: 9709 - 9723
6. Recruiter's Initials: K M
7. Time Recruiting Began: 11:05 a.m.
8. Acceptances:
9. Refusals:

8a. Screener Acceptance	8b. Questionnaire No.	8c. Time Now
1	9709	11:07
2	9710	11:11
3	9711	11:20
4	9712	11:30
5	9713	11:42
6	9714	11:49
7	9715	11:58
8	9716	12:06
9	9717	12:10
10	9718	12:20
11	9719	12:35
12	9720	12:42
13	9721	12:47
14	9722	12:52
15	9723	12:55
16		
17		
18		
19		
20		

9a. Refusals who are Screeners: //// ||||
TOTAL= 9

9b. Refusals who are Users: //// //// //// //// //// //// //// ||||
TOTAL= 38

9c. Refusals who have already filled out questionnaire:
TOTAL= 0

10. Time Recruiting Ended: 12:55 p.m.

11. Questionnaire Control:
a. No. Complete: 13
b. No. Incomplete: 2
c. No. Not Used: 0
d. Total (a+b+c): 15

12. If Time block was cancelled, give reason(s) for cancellation: —

13. General Problems or Comments:

#9b. Total the number of "Refusals who are Users" and record the total in the box.

#9c. Total the number of "Refusals who have already filled out the Questionnaire" and record the total number in the box.

#11a. Number of completed questionnaires at end of data collection period.

#11b. Number of incomplete questionnaires at end of data collection period, i.e. questionnaires that respondents began to fill out but did not finish.

#11c. Number of questionnaires not distributed to respondents.

#11d. Total of adding 7a + 7b + 7c.

#12. If the time block was cancelled, explain in your own words the reasons for cancellation of the time block.

#13. General Problems or Comments. Describe any problems that occurred which may have affected the quality of data collected during the time block, e.g. noise, traffic between classes, etc. If respondents had problems with specific questions, these problems can be listed here.

2.4.9 Return Data Collection Materials

(See section 2.3.9).

Part 3
Supervision of Data Collection Procedures

3.1 Selecting Data Collectors

Library Supervisors are responsible for the selection of Data Collectors since they are familiar with their library's staff and staff availability. Supervisors should choose Data Collectors who possess the following attributes:

1. Completely honest in work
2. Reliable, conscientious and responsible
3. Utterly objective and neutral in manner
4. Interested in people; understanding
5. Able to inspire people's confidence and put them at ease
6. Inconspicuously, but neatly dressed

3.2 Training of Data Collectors

The Library Supervisor is responsible for training Data Collectors and may choose to train them individually or in a group. Part 2 of this Manual is written with the Data Collector in mind and can be given to Data Collectors to read before a training session with the Library Supervisor and to consult during the Data Collection process; however, reading Part 2 of the Manual does not substitute for a training session. If a training session cannot be arranged before Data Collection, the Data Collector must read Part 2 of the Manual and discuss any questions about the Manual with the Library Supervisor.

A training session for Data Collectors is presented by the Library Supervisor. Before the training session Data Collectors are given Part 2 of the Manual, User and Nonuser Questionnaires to read. The agenda of the training session covers:

(1) Background of the Project. Highlight main points of section 1.1 of the Manual and the Information Sheet.

(2) Schedule. Inform Data Collectors that you will provide them with a schedule of the days, times, library location (or terminal location for user questionnaires) when they will recruit respondents. On their schedule, the codes corresponding to days, times, locations, etc., will be listed

so that they can transfer this information to the covers of questionnaires when post-coding (see sections 2.3.7 - 2.3.8 and 2.4.7 - 2.4.8).

(3) User Questionnaire. Walk through the process of administering the user questionnaire by following sections of the Manual:

(a) 2.3.1. Where to obtain materials and what materials to obtain.

(b) 2.3.2. How to set up the Data Collection Site.

(c) 2.3.3. How to Recruit Users and their Possible responses to the Data Collector's recruitment effort.

(d) 2.3.4. How to Handle Questions from Users.

(e) 2.3.5. How to Fill in the Time Block Report Form during Data Collection.

(f) 2.3.6. How to Close up the Data Collection Site..

(g) 2.3.7. How to Post-Code User Questionnaires. Refer to information provided by Supervisor in the schedule.

(h) 2.3.8. How to Complete the User Time Block Report Form.

(i) 2.3.9. Where to Return Data Collection Materials.

(j) 2.3.10. What to do if the Computer Catalog goes Down.

(4) Nonuser Questionnaire. Walk through the process of administering the nonuser questionnaire by following sections of the Manual:

(a) 2.4.1. Where to obtain materials and what materials to obtain

(b) 2.4.2. How to set up the data collection site.

(c) 2.4.3. How to recruit nonusers and their possible responses to the Data Collector's recruitment effort.

(d) 2.4.4 How to handle questions from nonusers.

(e) 2.4.5. How to fill in the Time Block Report Form during Data Collection.

(f) 2.4.6. How to close up Data Collection Site.

(g) 2.4.7. How to Post-Code Nonuser Questionnaires

(h) 2.4.8. How to Complete the Nonuser Time Block Report Form.

(i) 2.4.9. Where to Return Data Collection Materials.

(5) Problems.

(a) Data Collector illness or unable to recruit during his scheduled time block. Action: notify Library Supervisor.

(b) Frequent computer catalog down time. Action: report on Time Block Report Form; consult section 2.3.10 of Manual, close up data collection site if necessary.

(c) Some questionnaires missing at end of Time Block. Action: report on Time Block Report Form.

(d) All questionnaires not used up at end of time block. Action: report on Time Block Report Form; close up data collection site at end of time block; return unused questionnaires in ascending numerical order to respective pile of unused questionnaires in storage area.

(e) No acceptance of questionnaires during a Time Block. If this repeatedly occurs, contact Study Coordinators (Markey or Kaske) for immediate action.

(6) Practice of Recruiting Users and Nonusers. The Library Supervisor gives Data Collectors 2 copies of the user questionnaire (or nonuser questionnaire), 1 copy of the Time Block Report Form, and ID Badges. Data Collectors are assigned to a particular library or terminal location to recruit 2 users or nonusers to complete the questionnaires and fill out the Report Form just like they were performing the actual study. The Library Supervisor intermittently and unobtrusively observes the Data Collectors. Data Collectors and Library Supervisor meet at the Training Room to debrief, ask questions, and, if necessary, review procedures.

Supervisor K. MAHONEY

Library PURDUE UNIVERSITY LIBRARIES

Circle: (USER) NONUSER

SUPERVISOR'S REPORT FORM

DATE OF TIME BLOCK	QUESTIONNAIRE NOS. OUT	QUESTIONNAIRE NOS. IN	NO. COMPLETE	NO. INCOMPLETE	NO. OF REPEATERS	NO. OF REFUSALS (USERS)	NO. OF REFUSALS (NON-USERS)	PROBLEMS	ACTION	COMMENTS
4-1-82	6209	6218	12	1	1	17	2	COMPUTER DOWN FOR 5 MINUTES	CONTINUED COLLECTING LIKE NORMAL HAPPENED	

Figure 6

3.3 Receiving, Storage and Return of Data Collection Materials

The Library Supervisor is sent data collection materials (see section 1.5) by the Study Coordinator. The only materials which the Supervisor supplies are chairs and a table at the data collection site which are used as a work station for respondents completing questionnaires, clipboard, no. 2 pencils, and watch (or timepiece).

We suggest the Library Supervisor arranges Data Collection Materials, e.g. user questionnaires, nonuser time block report forms, etc., in separate piles so that Data Collectors can return unused materials to their respective pile at the end of the data collection period. Materials should be stored in a safe but accessible (to Data Collectors) area.

The Supervisor's Report Form (see figure 6) is completed by the Library Supervisor and enumerates the week's problems and actions taken to remedy the problems. Most of the information is derived from User and Nonuser Time Block Report Forms, especially item #13. Supervisors need not fill in the questions, "problems," "actions," or "comments." Supervisors must complete the first eight columns about response data to the questionnaire. Figure 6 is completed for the Time Block information of Figure 3 in which users were recruited.

The UC/DLA facility has been designated by the Council on Library Resources as the Central Collection and Analysis Agency of the national study. If any problems occur with respect to mailing, write or call Betsy at UC/DLA (415-642-9485) or Karen Markey at OCLC (800-848-5800, ext. 6082). Every one or two weeks the Library Supervisor sends completed questionnaires and Supervisor's Report Form to:

Ms. Betsy Llosa-Sandor
University of California/Division of Library Automation
186 University Hall
Berkeley, CA 94720

Do not send questionnaires FOURTH CLASS MAIL! Please send completed questionnaires via Federal Express (2-day service) or U.S. Mail Registered and Certified. At least, use a mail service in which you can obtain a record of delivery to UC/DLA!

Every one or two weeks, Time Block Report Forms and copies of the Supervisor's Report Forms should be sent to:

Karen Markey
Office of Research
OCLC, Inc.
6565 Frantz Road
Dublin, OH 43017

A bulk mailing of all completed forms to OCLC or UC/DLA is risky given the track record of the U.S. Postal Service, especially during holiday seasons. (We almost lost 500 questionnaires during the Pilot Test in a Fourth Class U.S. Postal Service mailing!)

3.4 Problems: Down Time, Illness of Data Collectors, etc.

Procedures for Down Time are given in section 2.3.10. User Questionnaires completed during Time Blocks in which computer failures occur are still included in the analysis. The sampling schedule was constructed with problems in mind which may result in a missed time block. If all time blocks in the sampling schedule are used up and questionnaires remain unused, the Study Coordinators (Kaske or Markey) should be contacted. Likewise, if all questionnaires are used and time blocks remain, data collection is complete!

3.5 Quality Control

The utility of the entire study ultimately depends on the extent of compliance with procedures and the completeness and accuracy of information reported on the questionnaires. It is hoped that Library Supervisors take care to monitor and maintain the quality of the Data Collector's efforts. These measures include:

1. Making certain that Data Collectors are adequately trained before data collection begins.

2. Observing the Data Collector intermittently.

3. Reviewing Questionnaires and Time Block Report Forms submitted by Data Collectors after every time block. Questionnaires should be checked to be sure that all control information is complete and correct, all items have been completed, no extraneous marks appear which would interfere with machine entry of questionnaire data, and there are no tears or wrinkles.

3.6. Contacts at OCLC

Study Coordinators at OCLC are Neal Kaske and Karen Markey. Their addresses and telephone numbers are:

Neal K. Kaske
Director
Office of Research
OCLC, Inc.
6565 Frantz Road
Dublin, OH 43017
800-848-5800, ext. 6090

Karen Markey
Research Scientist
Office of Research
OCLC, Inc.
6565 Frantz Road
Dublin, OH 43017
800-848-5800, ext. 6082